MONTANA STATE UNIVERSITY

125 YEARS · MONTANA STATE UNIVERSITY · IN THE PEOPLE'S INTEREST

2017 Comprehensive Self-Study Report

MONTANA STATE UNIVERSITY

Submitted to the Northwest Commission on Colleges and Universities on September 1, 2017

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MSU photo by Adrian Sanchez Gonzalez

INSTITUTIONAL OVERVIEW

Since its inception in 1893 MONTANA STATE UNIVERSITY has built a reputation as a major research university that excels and innovates in academics, undergraduate research and creative projects, and outreach and engagement. More than 16,400 students enrolled at Montana State University in fall 2016, including 2,040 graduate students, making it the largest institution in Montana. MSU offers more than 225 academic options within its ten academic colleges. In 2016-17 MSU awarded 3,164 degrees and certificates. Those enrolled include more than 10,222 Montana students representing all 56 counties. That is the largest number of residents in MSU history and the largest of any higher education institution in Montana, helping MSU achieve its strategic objective to provide access and affordability to the state's students. The balance of MSU's students hail from every state in the nation and 72 countries. Along with increasing enrollment, MSU has enjoyed three continuous years from 2013-2015 of incoming freshman classes boasting the highest average GPAs, ACT and SAT scores since electronic record keeping began in the early 1990s.

MSU is the largest research university in Montana and the largest research and development entity in the state. This translates into many opportunities for students to do research of national importance on a variety of topics. Evidence of the success of these efforts includes receipt of a number of top national and international awards by MSU students. In the seven years since a comprehensive self-study was last submitted, MSU students have received the following: Rhodes Scholarships (3), Truman Scholarships (3), National Science Foundation Graduate Research Fellowships (31), Udall Scholarships (6), Boren Scholarships (6), Gates-Cambridge Scholarships (2, including the first Native American student to receive this award), Fulbright Grants (14) and a Marshall, Mitchell, Schwarzman Scholarship and the Pearson Prize for Higher Education. MSU students earned 21 Goldwater Scholarships during the period, retaining MSU's recognition as one of the nation's leaders in recipients of that scholarship for undergraduate excellence in science, math and engineering.

Many of the faculty members who make these accomplishments possible are similarly recognized as international experts in their field, and are members of elite academic organizations and winners of coveted awards. Those include awards from the National Academy of Medicine, National Academy of Inventors and the American Association for the Advancement of Science as well as the Presidential Early Career Award for Scientists and Engineers and early career awards from the National Science Foundation and the U.S. Department of Energy. This faculty excellence is at the root of MSU's national recognition among leading public research universities. MSU faculty garnered over $112 million for their research and creative projects in fiscal year 2016, making it Montana's largest research enterprise. MSU holds more than 230 active technology licenses. In addition, 92 patents and 35 plant variety certificates have been issued for MSU discoveries with many more pending. MSU's creativity has also helped spur Montana's economy. Bozeman, home to MSU, is recognized as one of the top small technology boomtowns in the country as a result of MSU faculty and graduate innovation and collaboration with the private sector.

Mindful of its historic land-grant mission to improve and empower the lives of all Montanans through the dissemination of knowledge, MSU Extension has a presence in all of the state's 56 counties. In addition, MSU's Agricultural Experiment Station and its seven research centers are strategically located across the state's climatic zones to aid the agriculture industry, one of the state's largest economic sectors. New MSU programs in hospitality management will address another of the state's largest economic sectors, tourism, by providing trained and knowledgeable innovators in that industry.

MSU is the center of medical education in the state, serving as the home campus for the state's WWAMI medical education program, a cooperative medical school with an emphasis on primary and rural medicine for medical students from the states of Washington, Wyoming, Alaska, Montana, and Idaho. Similarly, MSU is also the home campus for the WIMU, Montana's cooperative veterinary medicine program, which includes students from Washington, Idaho, Montana and Utah. MSU is also the largest baccalaureate granting nursing program in Montana, and offers the state's only graduate nursing program. MSU recently launched a center to address the mental health challenges unique to Montana and similar rural regions.

MSU is a model for the promotion of diversity and inclusion. The recipient of a transformative ADVANCE grant from the National Science Foundation, MSU has received national recognition for broadening the participation of women faculty in STEM and underrepresented areas of social and behavioral science on the university's campus.

Additionally, MSU is nearing the final year of its first comprehensive fundraising campaign, What It Takes. Launched in September 2015, the campaign's $300 million goal has been surpassed with more than $350 million contributed as of June 2017. MSU is now directing efforts to inspire giving for scholarships and faculty support with an emphasis on endowed gifts before the campaign concludes at the end of 2018.

The university is in the fifth year of a seven-year strategic plan, "Mountains and Minds: Learners and Leaders." The strategic plan, based on MSU's core themes, provides the framework for this seven-year report as well as a solid base for a dynamic future for Montana's oldest and largest land-grant institution.
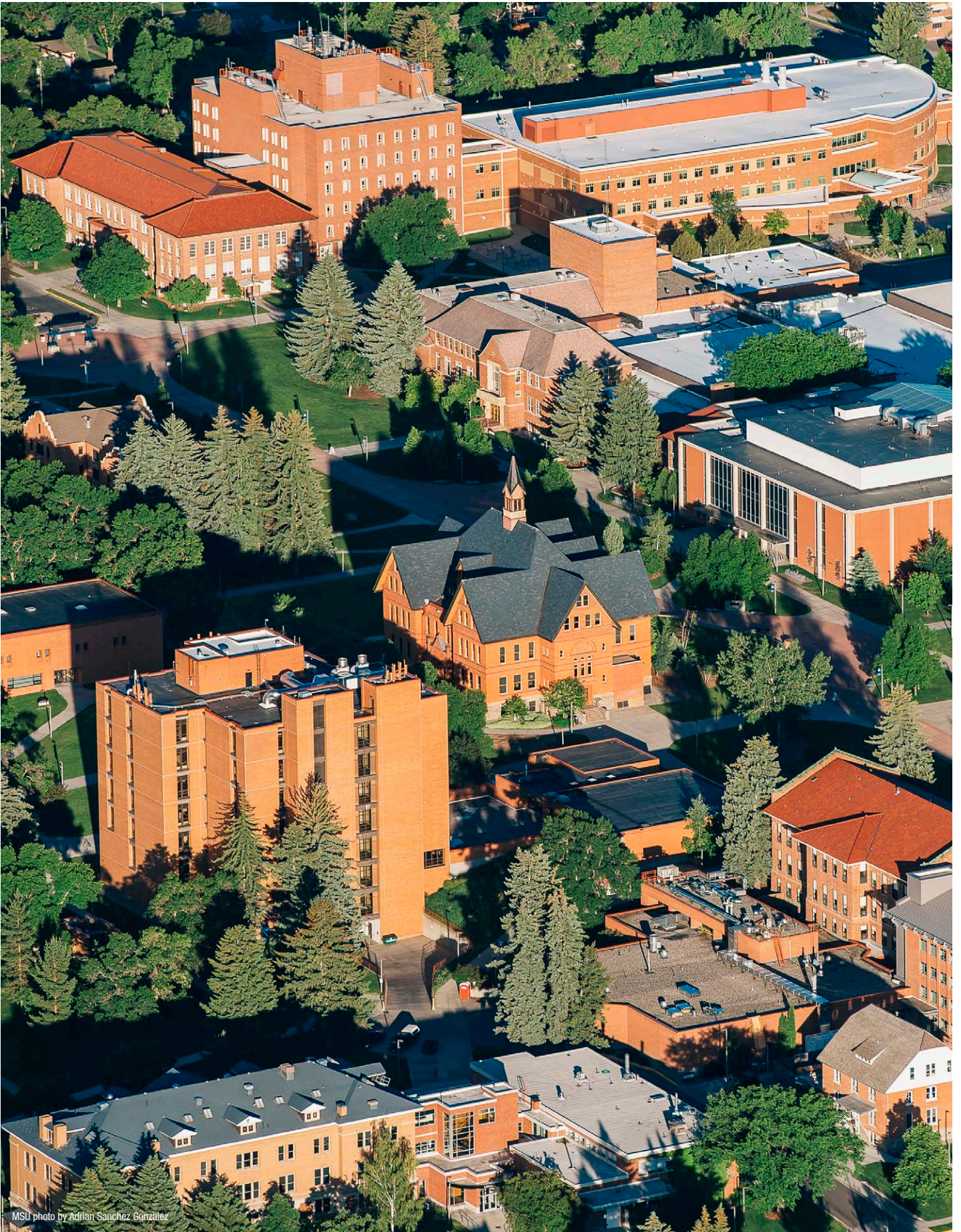
NWCCU REPORTS | BASIC INSTITUTIONAL DATA FORM

Information and data provided in the institutional self-evaluation are usually for the academic and fiscal year preceding the year of the evaluation committee visit. The purpose of this form is to provide Commissioners and evaluators with current data for the year of the visit. After the self-evaluation report has been finalized, complete this form to ensure the information is current for the time of the evaluation committee visit. Please provide a completed copy of this form with each copy of the self-evaluation report sent to the Commission office and to each evaluator. This form should be inserted into the appendix of the self-evaluation report (see the guidelines).

Institutional Information

Montana State University
Mailing Address: P.O. Box 172440
City: Bozeman
State/Province: MT
Zip/Postal Code: 59717
Main Phone Number: 406-994-4361
Country: USA

Chief Executive Officer
Title (Dr., Mr., Ms., etc.): Dr.
First Name: Waded
Last Name: Cruzado
Position (President, etc.): President
Phone: 406-994-2341
Fax: 406-994-1893
Email: president@montana.edu

Accreditation Liaison Officer
Title (Dr., Mr., Ms., etc.): Dr.
First Name: Tamela
Last Name: Eitle
Position (President, etc.): Associate Provost
Phone: 406-994-4371
Fax: 406-994-7989
Email: teitle@montana.edu

Chief Financial Officer
Title (Dr., Mr., Ms., etc.): Mr.
First Name: Terry
Last Name: Leist
Position (President, etc.): Vice President
Phone: 406-994-4361
Fax: 406-994-1969
Email: vpadmin@montana.edu

Institutional Demographics

Institutional Type *(Choose all that apply)*

■ Comprehensive

☐ Specialized

☐ Health-Centered

☐ Religious-Based

☐ Native/Tribal

☐ Other (specify): _____

Degree Levels *(Choose all that apply)*

■ Associate

■ Baccalaureate

■ Master

■ Doctorate

■ If part of a multi-institution system,
   name of system: _____ Montana University System _____

Calendar Plan *(Choose one that applies)*

■ Semester

☐ Quarter

☐ 4-1-4

☐ Trimester

☐ Other (specify): _____

Institutional Control

☐ City   ☐ County   ■ State   ☐ Federal   ☐ Tribal

● Public   OR   ○ Private/Independent

● Non-Profit   OR   ○ For-Profit

STUDENTS (ALL LOCATIONS)

Full-Time Equivalent (FTE) Enrollment (Formula used to compute FTE: IPEDS)

Official Fall: <u>2016</u> FTE Student Enrollments

Classification	Current Year: 2016	One Year Prior: 2015	Two Years Prior: 2014
Undergraduate	12965	12350	11948
Graduate	1057	1010	1049
Professional			
Unclassified			
Total all levels	14022	13360	12997

Full-Time *Unduplicated* Headcount Enrollment (Count students enrolled in credit courses only.)

Official Fall: 2016 (most recent year) Student Headcount Enrollments

Classification	Current Year: 2016	One Year Prior: 2015	Two Years Prior: 2014
Undergraduate	14400	13707	13371
Graduate	2040	1981	2050
Professional			
Unclassified			
Total all levels	16440	15688	15421

FACULTY (ALL LOCATIONS)

- Numbers of Full-Time and Part-Time Instructional and Research Faculty & Staff
- Numbers of Full-Time (only) Instructional and Research Faculty & Staff by Highest Degree Earned

Include only professional personnel who are primarily assigned to instruction or research.

Total Number: 1909 Number of Full-Time (only) Faculty and Staff by Highest Degree Earned

Rank	Full-Time	Part-Time	Less than Associate	Associate	Bachelor	Masters	Specialist	Doctorate
Professor	191	12				15		187
Associate Professor	194	8			2	49		151
Assistant Professor	186	5			5	31		148
Instructor	39	63			22	50		26
Lecturer and Teaching Assistant	125	832		9	340	160		64
Research Staff and Research Assistant	183	71			60	49		44
Undesignated Rank								

FACULTY (ALL LOCATIONS)

Mean Salaries and Mean Years of Service of Full-Time Instructional and Research Faculty and Staff. Include only full-time personnel with professional status who are primarily assigned to instruction or research.

Rank	Mean Salary	Mean Years of Service
Professor	105,187	22.06
Associate Professor	74,526	14.95
Assistant Professor	67,038	6.06
Instructor	55,804	20.62
Lecturer and Teaching Assistant	51,397	8.54
Research Staff and Research Assistant	48,364	10.22
Undesignated Rank		

INSTITUTIONAL FINANCES

Financial Information. Please provide the requested information for each of the most recent completed fiscal year and the two prior completed fiscal years (three years total).

Montana State University Selected Statements of Cash Flows Data As of and For the year ended June 30	2016	2015	2014
Cash flows from operating activities:			
Cash received for revenues:			
Tuition and fees	$ 141,226,083	$ 133,116,537	$ 126,591,743
Federal grants and contracts	61,833,450	65,675,434	61,182,277
State grants and contracts	4,377,533	4,974,300	5,106,737
Private grants and contracts	12,060,953	9,028,711	9,565,461
Grant and contract indirect cost recoveries	15,769,991	15,397,265	14,686,242
Educational, public service and outreach revenues	17,127,440	16,390,514	17,188,333
Sales and services of auxiliary enterprises	42,889,531	39,641,155	36,043,356
Interest on loans receivable	320,965	174,802	247,550
Other operating receipts	2,036,378	1,580,728	2,005,274
Cash paid for expenses:			
Compensation and benefits	(222,226,575)	(213,644,264)	(201,742,570)
Operating expenses	(107,570,154)	(107,299,337)	(113,358,206)
Scholarships and fellowships	(14,713,832)	(14,265,927)	(15,209,543)
Loans made to students and federal funds repaid	(4,018,997)	(3,554,136)	(2,735,076)
Loan payments received from students	3,261,884	3,221,107	3,063,399
Intercampus payments	(28,644)	107,692	39,405
Net cash used in operating activities	**(47,653,994)**	**(49,455,419)**	**(57,325,618)**
Cash flows from noncapital financing activities:			
Receipts (disbursements) of funds held in trust for others	533,211	559,642	(62,259)
Direct lending proceeds	62,626,960	64,536,758	66,265,870
Direct lending disbursements	(62,626,960)	(64,536,758)	(66,265,870)

State and local appropriations	70,003,401	55,628,765	52,498,774
Federal pell grant funds received	13,480,578	14,091,575	15,343,193
Gifts and contributions (expendable)	12,824,916	13,083,157	11,898,448
Land grant income	1,816,734	2,957,241	2,887,735
Repayment of long-term advance from primary government	(58,595)	(57,168)	(55,774)
Additions to permanent endowments	15,230	159,335	46,755
Transfers between campuses and agencies	400,638	(147,698)	(74,594)
Net cash flows from noncapital financing activities	**99,016,113**	**86,274,849**	**82,482,278**
Cash flows from capital financing activities:			
Purchase of capital assets	(49,178,581)	(46,369,993)	(31,847,190)
Proceeds from sale of capital assets	50,519	74,344	247,414
Gifts restricted for capital purchase	11,640,828	9,578,658	1,634,500
Other capital financing activities	(118,627)	25,141	(12,650)
Proceeds from borrowings	4,805,000	336,000	68,700,651
Debt principal paid	(8,029,546)	(9,274,589)	(5,687,800)
Advances from primary government	247,876	1,587,841	494,560
Repayment of advances from primary government	(1,809,561)	(1,702,889)	(1,670,470)
Interest paid	(6,499,661)	(6,442,177)	(5,122,477)
Net cash change from capital financing activities	**(48,891,753)**	**(52,187,664)**	**26,736,538**
Cash flows from investing activities:			
Purchase of investments	(646,215)	(1,124,976)	(58,357,386)
Proceeds from sale of investments	19,808,315	23,920,974	4,655,043
Investment income	1,633,281	1,330,886	2,549,332
Net cash change from investing activities	**20,795,381**	**24,126,884**	**(51,153,011)**
Net change in cash and cash equivalents	**23,265,747**	**8,758,650**	**740,187**
Balances at beginning of year	**128,992,168**	**120,233,518**	**119,493,331**
Balances at end of year	**$ 152,257,915**	**$ 128,992,168**	**$ 120,233,518**

Montana State University Statements of Net Position As of June 30			
ASSETS	**2016**	**2015**	**2014**
Current assets:			
Cash and cash equivalents	$ 151,249,815	$ 127,984,119	$ 119,236,367
Short term investments	8,503,748	18,127,641	20,702,031
Securities lending collateral	669,217	884,158	834,121
Accounts and grants receivable, net	8,326,139	8,936,804	6,818,729
Amounts receivable from Federal government	13,206,539	11,617,006	15,358,100
Amounts receivable from primary government	397,310	235,249	448,712
Amounts receivable from MSU campuses	-	-	75,000
Loans receivable, net	3,177,173	3,187,735	2,918,811
Inventories	1,159,413	1,010,191	1,014,966
Prepaid expenses and other current asets	3,564,274	3,233,467	3,760,367
Total current assets	**190,253,628**	**175,216,370**	**171,167,204**
Noncurrent assets:			
Restricted cash and cash equivalents	1,008,100	1,008,049	997,150
Restricted investments	7,397,418	7,396,244	7,262,691
Loans receivable, net	15,424,484	15,428,471	15,591,979
Investments	20,488,585	30,035,188	50,753,342
Capital assets	343,235,838	315,357,269	291,398,940
Other noncurrent assets	4,609,030	5,692,380	9,841,999
Total noncurrent assets	**392,163,455**	**374,917,601**	**375,846,101**
Total assets	**$ 582,417,083**	**$ 550,133,971**	**$ 547,013,305**
DEFERRED OUTFLOWS	**$ 22,268,826**	**$ 18,858,399**	**$ 6,792,687**
LIABILITIES			
Current liabilities:			
Accounts payable and accrued liabilities	$ 34,122,819	$ 26,896,952	$ 26,230,594
Amounts payable to primary government	2,629,274	1,810,402	1,827,354
Amounts payable to Montana component units	226,060	69,286	107,047
Amounts payable to MSU campuses	4,048	32,692	-
Securities Lending Liability	669,217	884,158	834,121

Property held in trust for others	1,925,584	1,633,071	1,437,609
Deferred revenues	17,748,168	9,021,673	8,143,096
Compensated absences	11,689,389	11,356,260	11,619,647
Current portion debt and capital lease obligations	8,703,056	8,023,829	6,482,584
Total current liabilities	**77,717,615**	**59,728,323**	**56,682,052**
Noncurrent liabilities:			
Advances from primary government	15,326,443	16,697,241	16,872,009
Debt and capital lease obligations	145,736,280	150,259,786	161,316,580
Compensated absences	10,605,774	10,053,316	9,507,186
OPEB and Pension liability	88,719,573	81,306,200	34,653,263
Due to Federal government	18,095,012	18,392,589	18,267,129
Derivative instrument - swap liability	6,097,182	4,605,263	4,034,590
Total noncurrent liabilities	**284,580,264**	**281,314,395**	**244,650,757**
Total liabilities	**$ 362,297,879**	**$ 341,042,718**	**$ 301,332,809**
DEFERRED INFLOWS	**$ 4,128,946**	**$ 10,550,948**	**$ -**
NET POSITION			
Net investment in capital assets	$ 192,432,650	$ 182,476,257	$ 180,112,455
Restricted - nonexpendable	12,205,143	12,271,449	12,071,349
Restricted - expendable	12,329,791	12,465,852	12,914,573
Unrestricted	21,291,500	10,185,146	47,374,806
Total net position	**$ 238,259,084**	**$ 217,398,704**	**$ 252,473,183**

Montana State University
Statements of Revenues, Expenses and Changes in Net Position
As of and For the Year Ended June 30

	2016	2015	2014
Operating revenues:			
Tuition and fees	$ 140,505,246	$ 133,378,019	$ 126,597,234
Federal grants and contracts	62,953,553	61,856,328	64,112,897
State grants and contracts	4,597,824	4,908,599	4,791,705
Non-governmental grants and contracts	9,686,445	8,935,886	8,970,411
Grant and contract facilities and administrative cost recoveries	16,151,874	15,421,193	15,416,567
Educational, public service and outreach revenues	16,996,211	16,214,647	17,035,096
Auxiliary - housing	19,385,558	18,011,145	15,875,617
Auxiliary - food service	18,855,362	17,390,245	16,425,741
Auxiliary - other auxiliary sales and services	4,651,292	4,375,586	3,851,943
Interest earned on loans	53,898	49,342	51,833
Other operating revenues	2,036,378	1,580,729	2,005,274
Total operating revenues	**295,873,641**	**282,121,719**	**275,134,318**
Operating expenses:			
Compensation and benefits, including pensions	221,541,951	209,433,240	203,984,217
OPEB expense	3,708,696	3,654,359	3,723,107
Operating expenses	112,995,046	108,101,157	109,583,222
Scholarships and fellowships	14,713,832	14,265,927	15,209,543
Depreciation and amortization	24,340,588	23,756,937	23,521,587
Total operating expenses	**377,300,113**	**359,211,620**	**356,021,676**
Operating loss	**(81,426,472)**	**(77,089,901)**	**(80,887,358)**
Nonoperating revenues (expenses):			
State and local appropriations	65,440,077	56,894,686	52,498,774
Pell Grants	13,480,577	14,091,575	15,343,193
Land grant and timber sales income	1,816,734	2,957,241	2,887,735
Gifts	12,824,917	13,083,157	11,948,727
Investment Income	1,662,068	1,115,881	2,582,835
Interest expense	(5,223,107)	(6,137,811)	(5,395,844)
Net nonoperating revenues (expenses)	**90,001,266**	**82,004,729**	**79,865,420**

Income before other revenues, expenses, gains and losses	8,574,794	4,914,828	(1,021,938)
Transfers in (out)	400,638	(147,698)	(30,911)
Gain or loss on disposal of capital assets	(135,113)	(150,542)	(325,250)
Additions to permanent endowments	15,230	159,335	46,755
Gifts, capital grants and contributions	12,004,831	8,142,334	14,587,915
Capital Appropriations	-	-	-
Change in net position	$ 20,860,380	$ 12,918,257	$ 13,256,571
Net position, beginning of year	217,398,704	252,473,183	239,216,612
Restatement (pension)	-	(47,992,736)	-
Net position, end of year	$ 238,259,084	$ 217,398,704	$ 252,473,183

NEW DEGREE / CERTIFICATE PROGRAMS

Substantive Changes

Substantive changes including degree or certificate programs planned for 2016 – 2017 approved by the institution's governing body. If NONE, so indicate. *Please feel free to create the list using the headings we have specified and submit it as an Excel spreadsheet.*

* This listing does not substitute for a formal substantive change submission to NWCCU

Substantive Change	Certificate/Degree Level	Program Name	Discipline or Program Area
Level II	PhD	Individual Interdisciplinary Program	Interdisciplinary / Graduate School

Domestic Off-Campus Degree Programs and Academic Credit Sites

Report information for off-campus sites within the United States where degree programs and academic credit coursework is offered. (Add additional pages if necessary.)
- **Degree Programs** – list the *names* of degree programs that can be completed at the site.
- **Academic Credit Courses** – report the *total number* of academic credit courses offered at the site.
- **Student Headcount** – report the *total number* *(unduplicated headcount)* of students currently enrolled in programs at the site.
- **Faculty Headcount** – report the *total number* *(unduplicated headcount)* of faculty (full-time and part-time) teaching at the site.

Montana State University does not currently have any domestic off-campus degree programs or academic credit sites.

Distance Education

Degree and Certificate Programs of 30 semester or 45 quarter credits or more where at least 50% or more of the curriculum is offered by Distance Education, including ITV, online, and competency-based education. Adjust entries to category listings below as appropriate. ***If your list is longer than ten entries, please create a list using the heading we have specified and upload it in the box provided as an Excel spreadsheet.***

* *This listing does not substitute for a formal substantive change submission to NWCCU*

Name of Site	Physical Address	Degree/ Certificate Name/Level	Program Name	Student Enrollment (Unduplicated Headcount)	On-Site Staff (Yes or No)	Co-Sponsoring Organization (if applicable)
Billings	1500 University Drive; Box 574; Billings MT 59101	BSRN	Nursing	268	Y	NA
Great Falls	400 15th Ave South; Suite 106; Great Falls MT 59405	BSRN	Nursing	176	Y	NA
Kalispell	210 SunnyView Lane Suite 5; Kalispell MT 59901	BSRN	Nursing	87	Y	NA
Missoula	32 Campus Drive; #7416 Missoula MT 59812	BSRN	Nursing	33	Y	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	MS	Agriculture Education	1	NA	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	M.Ed	Curriculum & Instruction	47	NA	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	MS	Family & Finances; Family Financial Planning	19	NA	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	MS	Land Resource and Environmental Science	62	NA	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	BA	Liberal Studies Quaternity	39	NA	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	MS	Math - Math Education	22	NA	NA
ONLINE	Montana Hall 101; MSU; Bozeman MT 59717	MS	Science Education	209	NA	NA

Programs and Academic Courses Offered at Sites Outside the United States

Report information for sites <u>outside the United States</u> where degree programs and academic credit coursework is offered, including study abroad programs and educational operations on military bases. (Add additional pages if necessary)

- **Degree Programs** – list the *names* of degree programs that can be completed at the site.
- **Academic Credit Courses** – report the *total number* of academic credit courses offered at the site.
- **Student Headcount** – report the *total number (unduplicated headcount)* of students currently enrolled in programs at the site.
- **Faculty Headcount** – report the *total number (unduplicated headcount)* of faculty (full-time and part-time) teaching at the site.

Programs and Academic Credit Offered at Sites outside the United States

Name of Site	Physical Address	Degree Programs	Academic Credit Courses	Student Headcount	Faculty Headcount
Al Akhawayn University	PO Box 104 Avenue Hassan II , Ifrane, 53000 Morocco	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Eberhard-Karls Universitat Tuebingen	Universitat Tuebingen Wilhelmstrasse 9, Tuebingen, D-72074 Germany	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Kingston University	River House, 53-57 High Street, Kingston upon Thames, London, KT 1 1LQ, United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	3	n/a
Flinders University	The International Office GPO Box 2100, Adelaide, SA, 5001 Australia	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
Freie Universitat Berlin	Akademisches Auslandsamt Brummerstr. 52, Berlin, 14195 Germany	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Funen Art Academy	Brandts Torv 1, 4th Floor, 5000 Odense C, Denmark	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Hallym University	International Affairs Office 39 Hallymdaehak-gil, Chuncheon, Gangwon-do, 200-702 South Korea	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Higher Institute of Fine Arts - HISK	Charles de Kerchovelaan, 187a, 9000 Ghent, Belgium	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Jonkoping International Business School	Jonkoping University PO Box 1026, Jonkoping 551 11, Sweden	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Kadir Has University	International Office Fatih, Istanbul, 34083 Turkey	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
KEDGE Business School	Rue Antoine Bourdelle- Domaine de Luminy BP 921 Marseille Cedex 09, 13288 France	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Kumamoto Gakuen University	2-5-1 Oe , Kumamoto, 862-8680 Japan	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Kumamoto University	International Student Office 2-40-1 Kurokami, Kumamoto, 860-8555 Japan	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a

Lancaster University	International Office C14, University House, Lancaster, LA1 4YW United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Lanzhou University	22 South Tianshui Road 730000 , Lanzhou, Gansu, PR China	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	5	n/a
Letra Hispanica	C/ Peña Primera, 18., 37002 Salamanca, Spain	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Martin Luther Universitat Halle-Wittenburg	Universitätsplatz 11 , Halle (Saale), 06099 Germany	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Massey University	Massey University Albany, Private Bag 102904. North Shore, Auckland 0745 New Zealand, Massey University Manawatu, Private Bag 11 222, Palmerston North 4442 New Zealand Massey University Wellington, PO Box 756, Wellington 6140 New Zealand	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	4	n/a
Naitonal Univeristy of Ireland, Galway	NUI Galway, University Road, Galway, Ireland	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	4	n/a
Norwegian School of Sport Sciences	International coordinator P.O.box 4014 Ullevål Stadion 0806 Oslo, Norway	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Norwegian University of Life Sciences (UMB)	P.O. Box 5003, NO-1432 Ås, Norway	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Norwegian University of Science and Technology	O.S. Bragstads plass 3 NO- 7491, Trondheim, Norway	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Plymouth University	Drake Circus, Plymouth, Devon, PL4 8AA United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Polytechnic University of Valencia	Oficina de Programa Internacionales Edificio 3A Camino de Vera, s/n, Valencia, , 46022 Spain	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Pontificia Universidad Catolica Argentina	Av. Alicia Moreau de Justo 1300, C1107AAZ, Buenos Aires, Argentina	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Public University of Navarra-Pamplona	Campus Arrosadia - 31006 Pamplona-Iruña, Spain	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Stellenbosch University	Private Bag X1, Matieland, 7602, Stellenbosch, South Africa	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Stendhal University - Grenoble III	Université Stendhal – Grenoble 3 - BP 25 - 38040 Grenoble Cedex 9, France	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Technische Universitat of Berlin	International Office Straße des 17. Juni 135, Berlin, D-10623 Germany	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
Thammasat University	Floor 1, Dome Building, Prachan Campus 2 Prachan Road, Bangkok, 10170 Thailand	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a

The Swedish School of Sport and Health Sciences	Munkbron 11, SE-111 28 Stockholm, Sweden	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Universidad Autonoma de Guadalajara	Av Patria 1201, Lomas del Valle, 45129 Zapopan, Jalisco, Mexico	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Universidad De Belgrano	Universidad de Belgrano, Buenos Aires, Argentina	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Universidad Veritas	International Office 1Km al oeste de Casa Presidencial, San José, Zapote, Costa Rica	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Universite Joseph Fourier	BP 53, 38041 Grenoble cedex 9 France	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
Universite Paul Valery - Montpellier	Relations Internationales , Montpellier Cedex 5, 34199 France	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Universiteit Utrech	Utrecht University, P.O Box 80125, 3508 TC Utrecht, The Netherlands	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Amsterdam	International Student Affairs 1012 ZA, Amsterdam, Netherlands	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
University of Applied Sciences Ravesburg-Weingarten	Doggenriedstraße, 88250 Weingarten, Germany	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Bergen	International Student Mobility Division , Bergen, , N-5007 Norway	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Canterbury	20 Kirkwood Ave, Upper Riccarton, Christchurch 8041, New Zealand	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	7	n/a
University of Copenhagen	Nørregade 10, 1165 København, Denmark	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	3	n/a
University of Exeter	Study Abroad Office North Park Road, Exeter, Devon, EX4 4QE United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	6	n/a
University of Limerick	Castletroy, Co. Limerick, Ireland	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Lincoln	International Office Brayford Pool, Lincoln, LN6 7TS United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Mannheim	International Office , Mannheim, , 68131 Germany	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Sheffield	Western Bank Sheffield S10 2TN UK	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Oslo	International Relations Office PO Box 1072, Blindern, Oslo, 0317 Norway	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a

University of Oulu	International Relations PO Box 8100, Oulu, , FIN-90014 Finland	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Plymouth	International Office Drake Circus, Plymouth, , PL4 8AA United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Southern Queensland	International Office , Toowomba, Queensland 4350, QLD 4350 Australia	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Waikato	Knighton Rd, Hamilton 3240, New Zealand	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Western Australia - Perth	Study Abroad Office, International Centre M352 35 Stirling Highway, Crawley, Perth, Western Australia, 6009 Australia	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Western Sydney University	Exchanges & Study Abroad, Locked Bag 1797 Penrith South DC 1797, Sydney, NSW, Australia	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
University of Wollongong	Student Central Ground Floor, Building 17, Wollongong, NSW, 2522 Australia	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Yeditepe University	Tüp Bebek Merkezi Koordinatörlügü, 34758 Atasehir, Istanbul, Turkey	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Yonsei University	Division of International Education & Exchange 262 Seongsanno, Seodaemun-gu Seoul, , 120-749 South Korea	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Ankara University	Emniyet Mh., 06560 Ankara, Turkey	dual-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Gazi University	Gazi Üniversitesi, Gazi Egitim Fakültesi, Müzik Egitimi ABD, Teknikokullas, Ankara, Turkey	dual-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Istanbul Technical University	Kaptanı Derya Ibrahim Pasa Sokak, 34116 Beyazıt – Istanbul, Turkey	dual-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Selcuk University	Vali Izzetbey Caddesi Karatay Muzesi Karsisi , Karatay - Konya, 42151 Turkey	dual-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
American University of Rome	Via Pietro Roselli 4, 00153 Rome IT	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Bond University	14 Univrsity Drive, Robina QLD, 4226 AUSTRALIA	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Edge Hill University	St Helens Road, Ormskirk Lancashire, L39 4QP United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Institut Francais des Aples	Ifalpes Annecy, 14 Avenue du Rhone, 74000 Annecy, FRANCE	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	3	n/a
Institute for American Universities	27, Place de l'Universite, BP 30970, 13604 Aix-en-Provence CEDEX 1	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a

International College of Seville	Seville, Spain	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
International House Heidelberg	Bergstrafle 106, 69121 Heidelberg, GERMANY	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Kingston University	River House, 53-57 High Street, Kingston upon Thames, London, KT 1 1LQ, United Kingdom	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Lorenzo de' Medici		non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Universidad San Ignacio de Loyola	Av. La Fontana 550, La Monlina, Lima, Peru	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
University of Stirling	FK9 4LA Scotloand, UK	non-degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.		n/a
Multiple locations	Peru	MSU faculty led	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	27	2
University of Bergen	Germany	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
Multiple locations	London	MSU faculty led	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	2
University of Bern	Bern, Switzerland	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Multiple locations	Iceland	MSU faculty led	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	9	2
Versalius College	Burussels, Belgium	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Universidad de Palerom	Buenos Aires, Argentina	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Universidad Blas Pascal	Cordoba Argentina	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	2	n/a
Multiple locations	Morocco	faculty led	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Karl-Franzens-Universitat Graz	Graz, Austria	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
University of Hyderabad	Hyderabad, India	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a
Ritsumeikan University	Kyoto, Japan	non degree	*varies, all students required to maintain 'full-time' to be eligible for federal financial aid.	1	n/a

INSTITUTIONAL CHANGES

The Year Seven Self-Study provides Montana State University with an important opportunity to look both backward and forward as an institution. There have been many changes at MSU since the last report to NWCCU at the Mid-Cycle Review in 2014. These changes feature prominently within the Year Seven Self-Study as evidence of data driven planning and support of Montana State University's strategic plan and core themes. Guided by the priorities established in its mission statement and core themes, programs and offices have been developed, new student success initiatives have been enacted, new buildings constructed and learning technologies have been updated, in short, MSU has grown both physically as well as institutionally.

MSU has enjoyed continued undergraduate enrollment growth and an expansion of its research and engagement agendas, which in turn inform the core themes that are described in this report. The record-setting incoming freshman classes in 2015 and 2016 and increasing numbers of new faculty create a dynamic and exciting atmosphere at MSU. Yet, the institution recognizes the challenges to be faced in maintaining high standards as enrollment continues to grow and expectations for students, faculty and staff are greater than ever before. The collection of information and documentation of processes required for this self-study have been great resources as the university turns its energies to a new cycle of strategic planning in order to build an even stronger institution.

As seen in Table Preface 1, there have been several new administrators over the last few years.

Table Preface.1: Administrative changes

Position	Name	Year Hired
Executive Vice President and Provost	Dr. Robert Mokwa	Interim, 2016 Permanent, 2017
Vice President of Research and Economic Development	Dr. Renee Reijo Pera	2014
Vice President and Dean, College of Agriculture	Dr. Charles Boyer	2014
Vice President of Information Technology and Chief Information Officer	Jerry Sheehan	2014
Vice President for Student Success	Dr. Chris Kearns	2014
Dean, College of Arts and Architecture	Dr. Royce Smith	2016
Dean, College of Education, Health & Human Development	Dr. Alison Harmon	Interim, 2016 Permanent, 2017
Athletic Director	Leon Costello	2016
University Legal Counsel	Kellie Peterson	2015
Director, Office of Institutional Equity	Jyl Shaffer	2016
Associate Provost and Accreditation Liaison Official	Dr. Tamela Eitle	Interim, 2017

Along with administrative changes, there have been new programs, offices and centers designed to advance MSU's mission and strategic planning. These will be discussed in detail throughout this document.

MSU photo by Adrian Sanchez Gonzalez

Standard 1

MISSION, CORE THEMES, AND EXPECTATIONS

EXECUTIVE SUMMARY OF ELIGIBILITY REQUIREMENTS 2 AND 3

Eligibility Requirement 2- Authority

Montana State University is one of 16 public colleges and universities that form the Montana University System (MUS). The Montana Constitution vests the MUS Board of Regents with powers and responsibilities to control and govern the operation of Montana State University and confers the university authority to grant degrees at the associate, baccalaureate, master's and doctoral levels.

Eligibility Requirement 3 – Mission and Core Themes

Since its establishment in 1893, Montana State University has realized its tri-partite, land-grant mission of learning, discovery and engagement, although the language of the mission has varied slightly with the times through the past 125 years. The university's mission statement was most recently updated in 2011 and approved that year by the MUS Board of Regents. The university's mission statement also appears prominently on the university's website.

Likewise, the Montana Board of Regents approved MSU's core themes in 2014. MSU's core themes were updated as part of a campus-wide strategic planning effort and derive directly from the university's mission statement. These themes reflect the priorities of the strategic plan and are used to guide investments so that the institution devotes all, or substantially all, of its resources to support its educational mission and core themes, as required by the Northwest Commission on Colleges and Universities (NWCCU).

STANDARD 1.A: MISSION

1.A.1 **The institution has a widely published mission statement—approved by its governing body—that articulates a purpose appropriate for an institution of higher learning, gives direction for its efforts, and derives from, and is generally understood by, its community.**

> *"Montana State University, the State's land-grant institution, educates students, creates knowledge and art, and serves communities, by integrating learning, discovery, and engagement."*

The most recent version of the Montana State University mission statement was approved by the Montana Board of Regents in November 2011 (see page 14 of linked document). Upon approval, the mission statement was posted on the university website. The revised statement was formally announced to the university community in MSU's internal, electronic campus newsletter, MSU Today, on January 5, 2012, followed by the mailing of mission statement postcards to all university employees. Likewise, the Montana Board of Regents approved the most recent version of MSU's core themes in 2014. MSU's core themes were updated as part of a campus-wide strategic planning effort and derive directly from the university's mission statement.

Montana State University embraces its historical tri-partite, land-grant mission of learning, discovery and engagement and adds the additional core themes of integration, access and stewardship. At MSU these six core themes embody the role of a state land-grant institution in the 21st Century. Everyone carries out these core themes at levels that are appropriate for a state-assisted, land-grant, research university. The mission statement and core themes identify priorities and direct strategic planning, guiding units at every level of the institution to allocate resources and to direct investments in service of the mission.

1.A.2 **The institution defines mission fulfillment in the context of its purpose, characteristics, and expectations. Guided by that definition, it articulates institutional accomplishments or outcomes that represent an acceptable threshold or extent of mission fulfillment.**

MSU defines mission fulfillment as making progress towards the goals defined in the 2013-2019 Strategic Plan. In the Mid-Cycle Review, the university proposed a quantifiable way of determining the extent of mission fulfillment by setting targets for 2017, the year of the Year Seven Accreditation visit. These were scaled-back targets, interpolated to 70% of the 2019 Strategic Plan Targets. The 2017 accreditation targets, like MSU's 2019 Strategic Plan targets, reflect MSU's high expectations for itself, its faculty, staff and students in fulfilling mission and core themes. In MSU's Mid-Cycle Review, the university defined mission fulfillment as meeting 60 percent of these aspirational 2017 targets.

MSU's Planning Council (PC) is responsible for promoting alignment between MSU's strategic plan and resource development and allocation. The role and engagement of PC in MSU's strategic plan is discussed in greater detail throughout this self-study, specifically in 3.A.1. In AY15, AY16, and AY17, PC revisited the 2019 numeric targets for the strategic plan but did not make any substantive changes to the targets. As part of the work to write the Year Seven Self-Study, the PC

reviewed the 2017 accreditation targets and found that two targets should be improved to emphasize continued quality improvements. Table 1.1 below shows the two 2017 targets that were modified and a rationale for the change. Including the completion of the cycle of assessment explicitly in the New Targets emphasizes the relationship of assessment to continuous improvement, rather than assessment plan compliance alone. These revised targets and the 2017 targets outlined in the Mid-Cycle Review are documented in the core theme tables below.

Table 1.1: Changes in Performance Targets since Mid-Cycle Review

Core Theme and Objective	Mid-Cycle Target	New Target	Rationale for Change
Learning, L.1: Assess, and improve where needed, student learning of critical knowledge and skills (Programs)	70% of targets for mastery of disciplinary knowledge as developed in departmental learning assessment plans will be met	70% of programs will have course learning outcomes, assessment plans and have completed at least one cycle of assessment.	The council recommended that the target should encourage continuous improvement using the results of the assessment process to support implementation of improved student learning strategies.
Learning, L.1: Assess, and improve where needed, student learning of critical knowledge and skills (CORE 2.0)	70% of targets set in CORE 2.0 learning assessment plans will be met.	At least 5 of the 7 CORE 2.0 areas will have assessment plans and have completed at least one cycle of assessment.	The council recommended that the target should encourage continuous improvement using the results of the assessment process to support implementation of improved student learning strategies.

The work to write the 2017 Year Seven Self-Study report provided PC, as well as the broader MSU community, the opportunity to better understand the changes in the NWCCU Standards for Accreditation that have occurred since the last self-study in 2009. The self-study work also enhanced the university community's understanding of the critical role the strategic plan plays in MSU's definition of mission fulfillment for NWCCU accreditation purposes. As a result, PC has been engaged in productive discussion about how MSU can evaluate progress towards core theme objectives using both quantitative and qualitative techniques. These PC and broader conversations are on-going and will continue to refine strategic planning metrics and indicators, as well as assessment strategies to recognize NWCCU accreditation standards more fully. The goal is to move towards a process of continuous improvement in assessment that reflects the complexity in MSU fulfilling its mission without over-reliance, or sole reliance, on achieving specific numeric targets. Since the adoption of the strategic plan and finalization of its core themes, the University has annually assessed institutional accomplishments according to the plan's metrics and aligned its budget to support the core themes. Each year accomplishments, budget allocations and success stories in achieving the core themes are publicly presented in annual progess reports.

STANDARD 1B: CORE THEMES

1.B.1 The institution identifies core themes that individually manifest essential elements of its mission and collectively encompass its mission.

Montana State University mission statement:

> *"Montana State University, the State's land-grant institution, educates students, creates knowledge and art, and serves communities, by integrating learning, discovery, and engagement."*

Montana State's strategic goals represent the core themes of the Institution and these core themes are derived directly from MSU's mission statement.

Core Theme 1: **Learning** = *"educates students"*
Core Theme 2: **Discovery** = *"creates knowledge and art"*
Core Theme 3: **Engagement** = *"serves communities"*
Core Theme 4: **Integration** = *"by integrating learning, discovery, and engagement"*
Core Themes 5 and 6: **Access and Stewardship** = *"the state's land-grant institution"*

MSU's core themes were updated as part of a campus-wide Strategic Plan in 2012. The Montana BOR approved (see page 15 of linked document) an updated core themes document in September, 2014. A strategic plan progress report that details progress on achieving the goals of the strategic plan is completed annually and posted to the MSU planning website.

The Strategic Plan's objectives and metrics also were used as the core themes' objectives and performance indicators. Therefore, the strategic plan is the single planning document used on campus for both strategic and accreditation purposes.

The core themes directly reflect MSU's strategic goals; Figure 1.1 illustrates how the pillars of learning, discovery and engagement stand on the foundation of integration, access and stewardship. From this solid foundation the university's mission is supported.
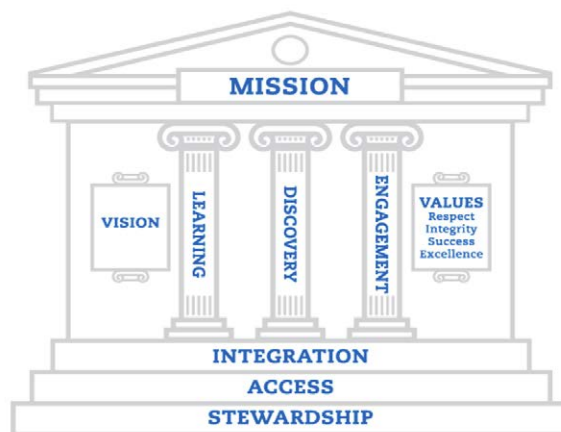

Figure 1.1: Montana State University's Core Themes

1.B.2 The institution establishes objectives for each of its core themes and identifies meaningful, assessable, and verifiable indicators of achievement that form the basis for evaluating accomplishment of the objectives of its core themes.

Tables 1.2-1.7 present the core theme goals, objectives, performance indicators, 2017 targets and results. The tables also introduce some of the strategies and programs that have been improved or initiated through continuous improvement efforts to move MSU towards its core theme goals. These strategies and programs as well as some spotlights of activities and achievements that MSU is particularly proud of will be discussed in detail in Standard 4 as evidence of the assessment and improvement processes that operate at MSU.

Table 1.2: Core Theme 1 Learning: Objectives, Performance Indicators, Targets and Results

Core Theme 1 LEARNING					
Description: Prepare graduates to meet the challenges of tomorrow. Successful, sought-after graduates are part of MSU's legacy, and preparing students is central to the institution's mission. MSU students learn in the classroom, lab, studio and field, through a hands-on, student-centered curriculum that integrates learning, discovery, and engagement in and out of the classroom.					
Goal Learning (L): MSU prepares students to graduate equipped for careers and further education.					
Objective	**Performance Indicators***	**2017 Target**	**Results**** (**Bold type** = met target)		
			Type	**Plan**	**Report 2015/16**
L.1 Assess, and improve where needed, student learning of critical knowledge and skills.	Percentage of programs engaged in program assessment	70%	2-year 4-year Masters PhD	**100%** **95%** **100%** **100%**	**82%** 60% 48% 30%
	Percentage of Core 2.0 areas doing assessment	5 of 7	**5 of 7**		
L.2 Increase graduation rates at MSU.	Six-year graduation rate	61%	53%		
	Graduate degrees awarded	600	**648**		
	Doctoral degrees awarded	72	**84**		
	Associate degrees awarded	60	**82**		
	Workforce certificates awarded	56	**78**		
	First time full time freshman retention rate	80%	76%		
L.3 Increase job placement and further education rates	Percentage of graduates employed in major/chosen field	67%	**78%**		
	Percentage of graduates enrolled in graduate school	24%	17%		

Table 1.2: cont.

Strategies/Programs	Spotlights
Academic Program Review and Assessment	Classrooms that Support Active Learning
Honors College	Peer Tutors
Allen Yarnell Center for Student Success	Instructional Designer
Gallatin College	Student Mental Health Services
UPdate Scholarship Administration	
UPdate Advising/Sophomore Surge	
Support of Math Learning	
MSU Writing Center	

*Rationale for performance indicators: For the Learning Core Theme (MSU prepares students to graduate equipped for careers or further study), objectives focus on:
- "prepare" – assess and improve student learning of critical knowledge and skills,
- "to graduate" – increase graduation rates at MSU,
- "equipped for careers and further study" – increase job placement and further education rates.

Performance indicators then track performance in each objective; for example, graduation rates clearly measure performance on the second objective, while additional metrics that measure the absolute number of degrees awarded at different levels reflect the integrated spirit of the plan. Increasing graduation rates could be accomplished by restricting access, which would violate another core theme, so MSU monitors both kinds of measures.

**Results are based on 2016/2017 data. Academic Assessment reports for AY16-17 are not due to the Provost office until September 15, 2017.

Data Sources: Provost's Office, Office of Planning and Analysis, OCHE Student Data Warehouse, Career Destinations Survey two classes earlier.

Table 1.3: Core Theme 2 Discovery: Objectives, Performance Indicators, Targets and Results

Core Theme 2 DISCOVERY			
Description: Innovative and significant research and creative activities distinguish the 21st century university and are a recognized hallmark of MSU, where faculty, students and staff all participate in the creation of knowledge and art.			
Goal Discovery (D): MSU will raise its national and international prominence in research, creativity, innovation and scholarly achievement, and thereby fortify the university's standing as one of the nation's leading public research universities.			
Objectives	**Performance Indicators***	**2017 Target**	**Results**** (Bold type = met target)
D.1 Elevate the research excellence and recognition of faculty.	# Tenure-track/tenured faculty	Increase from 554	**583**[a]
	# Faculty with national/international refereed scholarly products.	Increase from 319	**367**
	Academic Analytics average faculty percentile	Increase from 48.69	48.56[a]
	# National and international awards and honors earned by faculty	Increase from 90	**129**
	STEM R&D expenditures Carnegie rank	Improve from 98	104[a]
	Non-STEM R&D expenditures Carnegie rank	Improve from 92	**72**[a]
	Science and engineering research staff Carnegie rank	Improve from 103	104[a]
	Doctoral conferrals Carnegie rank	Improve from 106	116[a]
D.2 Enhance infrastructure in support of research, discovery and creative activities.	Funding for capital projects from public and private sources	Cumulative investment	**Investing**
	Grant-sponsored investments to centers, core facilities and resources	Cumulative investment	**Investing**
D.3 Expand the scale, and breadth, and quality of doctoral education.	% of faculty who advise doctoral students	Increase from 46.9%	**48.8%**
	Graduate student headcount	2140	2040
	Doctoral student headcount	Increase from 397	**596**
	Graduate degrees awarded (Summer, Fall, Spring)	600	**648**
	STEM graduate degrees awarded (Summer, Fall, Spring)	325	**349**
	All Doctoral degrees awarded (Summer, Fall, Spring)	73	**84**
	# Faculty scholarly products co-authored/ presented with graduate students	Increase from 383	**617**

Table 1.3: cont.

Strategies/Programs	Spotlights
Research Infrastructure Grants	APLU Designated MSU as an Innovation and Economic Prosperity University
Task Force on Strengthening Research and Scholarly Work	Internal Funding Programs for Research, Discovery and Creative Activities
Task Force on Improving Graduate Student Admissions and Degree Completion	Center for Faculty Excellence
Montana Research and Economic Development Initiative (MREDI)	ScholarWorks Institutional Repository
ADVANCE Project TRACS	Research Centers

*Rationale for performance indicators: For the Discovery Core Theme (MSU will raise its national and international prominence in research, creativity, innovation and scholarly achievement, and thereby fortify the university's standing as one of the nation's leading public research universities), objectives focus on:
- "prominence" – elevate the research excellence and recognition of MSU faculty,
- "fortify" – enhance infrastructure in support of research, discovery and creative activities,
- "public research universities" – expand the scale, breadth and quality of doctoral education.

Performance indicators then track performance in each objective; for example, to support MSU's standing as a public research university, MSU must recognize that the doctoral program is an outlier, small compared to other public research universities, so instead the university tracks faculty involvement in doctoral education, doctoral degree production, and student scholarly productivity. Because this objective overlaps with Integration, MSU specifically tracks scholarly output co-authored, co-created, or co-presented with faculty.

**Results are based on 2016/2017 data unless followed by [a] which indicates the most recent data available was presented.

Data Sources: Provost's Office, Activity Insight, Academic Analytics, Office of Planning and Analysis, NSF HERD and Academic R&D Survey, NSF/GSS Survey of Graduate Students and Post Docs in Science and Engineering, OCHE Student Data Warehouse, University Business Services, Office of Sponsored Programs.

Table 1.4: Core Theme 3 Engagement: Objectives, Performance Indicators, Targets and Results

Core Theme 3 ENGAGEMENT			
Description: Engagement is the collaboration between MSU and its local, state, national, and global communities for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. Engagement, a form of scholarship that bridges teaching, research and service, brings the university's intellectual resources to bear on societal needs.			
Goal Engagement (E): Members of the MSU community will be leaders, scholars and engaged citizens of their local, national and global communities, working together with community partners to exchange and apply knowledge and resources to improve the human prospect.			
Objectives	**Performance Indicators***	**2017 Target**	**Results**** (**Bold type** = met target)
E.1 Strategically increase service, outreach and engagement at MSU	Establish campus-wide coordinating infrastructure for engagement, outreach and service	Create Infrastructure	**Council and Office Created**
	% of students, faculty and staff involved in service, outreach and engagement (currently only have data on faculty through Activity Insight)	Increase from 48.5%	**67.1%[a]**
	# of MSU service, outreach, and engagement activities for students, faculty and staff (no data on staff)	Increase Increase from 3276	**4705**
	% of students actively participating in student organizations	Increase from 36.5%	**61.3%**
E.2 MSU graduates will have global and multi-cultural understanding and experiences.	% of students participating in cross-cultural study, work or service experiences	Increase from 2.6%	2.5%
E.3 MSU students, faculty and staff will have increased opportunities for leadership development.	# of opportunities for leadership development and practice for faculty, staff and students (no data on students)	Increase from 22	**39**
	% of faculty and staff participating in leadership development activities (no data on students)	Increase from 14.9%	**16.8%**

Table 1.4: cont.

Strategies/Programs	Spotlights
Outreach and Engagement Council	APLU Community Engagement Award
MSU Extension	Carnegie Community Engagement Classification
Boardroom Bobcats	Office of Student Engagement
Engineers without Borders	Developing Excellence in Academic Leadership
Indian Leadership Education and Development	The Year of Engaged Leadership
Bringing Native Community Experience to Nursing Students	MSU Leadership Institute
Convocation	Eclipse Ballooning Project
	Pollinator Health Center
	IDeA Network of Biomedical Research Excellence
	The Office of International Programs - Study Abroad Program

*Rationale for performance indicators: For the Engagement Core Theme (Members of the Montana State University community will be leaders, scholars and engaged citizens of their local, national and global communities, working together with community partners to exchange and apply knowledge and resources to improve the human prospect), objectives focus on:

- "working together with community partners" – strategically increase service, outreach and engagement at MSU,
- "local, national and global communities" – MSU graduates will have global and multicultural understanding and experiences,
- "leaders" – MSU students, faculty and staff will have increased opportunities for leadership development.

Performance indicators then track performance in each objective; for example, to be sure MSU is providing opportunities for leadership development, the university tracks both the number of on-campus leadership trainings for faculty and staff and self-reported faculty involvement in other leadership-development experiences like Harvard's educational management programs or Higher Education Resource Services (HERS). Training better leaders also reinforces the prominence of MSU's students, faculty, and staff, which supports the Discovery Core Theme as well.

**Results are based on 2015/2016 data unless followed by [a] which indicates 2016/2017 data.

Data Sources: Office of Planning and Analysis, Activity Insight, Office of Student Engagement, Office of International Programs, Center for Faculty Excellence, Professional Development & Training

Table 1.5: Core Theme 4 Integration: Objectives, Performance Indicators, Targets and Results

Core Theme 4 INTEGRATION			
Description: Integrating learning, discovery, and engagement is the marquee feature of the MSU strategic plan. Traditionally, land-grant universities have educated students, conducted research and provided outreach to their communities and states. MSU has gone a step further by regularly integrating research and teaching, practicing service-learning, and combining research with outreach. MSU now boldly defines the 21st century land-grant university as one where learning, discovery, and engagement merge seamlessly to the benefit of students, faculty, staff, and the wider community.			
Goal Integration (I): By integrating learning, discovery and engagement, and by working across disciplines, the MSU community will improve the world.			

Objective	Performance Indicators*	2017 Target	Results** (Bold type = met target)
I.1 Increase the integration of learning, discovery and engagement.	% of students with substantial curricular experience that integrates learning, discovery and engagement	70%	Undefined measure
	Department role and scope documents will include substantial integration of learning, discovery and engagement	70% Department Role and Scopes in Development	**100% Role and Scopes in Development**
	# Community-based research projects	Increase 35% From 158 to 214	**317**
	# Faculty scholarly products with undergraduate and graduate students	Increase 35% From 368 to 497	**711**
I.2 Increase work across disciplines.	# Students completing interdisciplinary programs	Increase 20% From 597 to 717	**782**
	# Interdisciplinary research and creative projects	Increase from 844	**1535**

Strategies/Programs		Spotlights
Optical Technology Center (OpTeC)		APLU Designated MSU as an Innovation and Economic Prosperity University
Oplontis exhibit at MSU's Museum of the Rockies		Blackstone LaunchPad
Messengers for Health		Towne Harvest Garden
Design Sandbox for Engaged Learning (DSEL)		4-H Day Camp Increasing Youth Interest in STEM
Bracken Business Communications Clinic		Interdisciplinary Research Centers

Table 1.5: cont.

*Rationale for core theme indicators: For the Integration Core Theme (by integrating learning, discovery and engagement, and by working across disciplines, the MSU community will improve the world), objectives focus on:
- "integrating" – increase the integration of learning, discovery and engagement,
- "working across disciplines" – increase work across disciplines.

Performance indicators then track performance in each objective; for example, to track progress on integrating learning, discovery, and engagement, M the faculty to identify which courses, independent learning experiences, research and creative projects, and engagement activities actually cross traditional boundaries. For example, faculty identify service learning (integration of learning and engagement), community-based participatory research (integration of discovery and engagement), or scholarship produced with students (integration of learning and discovery). A project may be all three, which exemplifies the objective perfectly, while it also supports the previous three core themes.

**Results are based on 2016/2017 data.

Data Sources: Activity Insight, OCHE Data Warehouse

Table 1.6: Core Theme 5 Access: Objectives, Performance Indicators, Targets and Results

Core Theme 5   ACCESS

Description: Land-grant universities were established by Congress in 1862 with the explicit intent to educate the sons and daughters of the industrial classes. MSU continues to fulfill that intent, believing that education serves society as a whole through job creation, stronger civic participation, and a reduction in the society costs borne by a less educated populace. MSU does not turn away qualified Montanans and will continue to provide access to a quality education for all students to improve the state and the well-being of its citizens.

Goal Access (A): Montana State University is committed to widening access to higher education and ensuring equality of opportunity for all.

Objectives	Performance Indicators*	2017 Target	Results** (Bold type = met target)
A.1 Educate more students while maintaining the quality of programs.	MT undergraduate headcount enrollment (Fall)	9500	8983
	# New transfer students (Summer and Fall)	1050	918
	Graduate student headcount enrollment (Fall)	2200	2040
	# Online credits (AY)	17600	**20840**
	# Online courses (AY)	200	**281**
	Gallatin College headcount enrollment (Fall)	340	**514**
	% of Financial need met (prior AY)	78%	74%
	Total headcount enrollment (Fall)	15300	**16440**

Table 1.6: cont.

A.2 Diversify the student body.	Native American student headcount enrollment (Fall)	690	650
	Other under-represented ethnicity and race headcount enrollment (Fall)	1100	**1507**
	International student headcount enrollment (Fall)	620	**722**
	Non-traditional age student headcount enrollment (Fall)	3000	2404

Strategies/Programs	Spotlights
Admissions Initiatives	Diversity and Inclusion Planning
Liberal Studies Online Degree Completion Program	Veteran's Services
Support of Online Instruction	Return-to-Learn Program
Hilleman Scholars	New student scholarship approach
TRiO	
Gallatin College	
University Studies	
Caring for Our Own Program	

*Rationale for core theme indicators: For the Access Core Theme (Montana State University is committed to widening access to higher education and ensuring equality of opportunity for all), objectives focus on:
  • "widening access" – educate more students while maintaining the quality of programs,
  • "equality of opportunity" – diversify the student body.

Performance indicators then track performance in each objective; for example, one way to widen access is to make in situ delivery possible, so MSU tracks the number of online courses as well as the enrollment in those courses measured by student credit hours. Providing wider access for some audiences requires additional financial assistance, so MSU measures the percentage of the financial need indicated through the FAFSA that is met, in order to hold the institution accountable for raising and distributing more aid.

**Results are based on 2016/2017.

Data Sources: MSU Office of Planning and Analysis, OCHE Student and Courses Data Warehouse, Banner Student Data, MSU Registrar's Reports

Table 1.7: Core Theme 6 Stewardship: Objectives, Performance Indicators, Targets and Results

Core Theme 6 STEWARDSHIP			
Description: As a public institution, MSU recognizes and honors its obligation to the many constituents who invest their time, financial resources, energy and support. MSU deeply values the public trust granted to it and is committed to continued good stewardship of its resources.			
Goal Stewardship (S): As steward of a land-grant institution, MSU will responsibly manage its human, physical, economic and environmental resources in an open and sustainable manner.			
Objectives	**Performance Indicators***	**2017 Target**	**Results** (**Bold type** = met target)
S.1 Human Resources: Attract, develop and retain the best faculty and staff to achieve the MSU mission	Average staff salary compared to peer market average	Increase from 77%	**82%**
	Average faculty salary compared to peer market average	76%	**81%**
	Average administrative salary compared to peer market	76%	70%
	Faculty and staff participation in professional development opportunities (# events participated in)	Increase 14% from 3691	**5730[a]**
S.2 Physical Resources: Enhance aesthetic appeal and functional quality of MSU physical resources to support high quality learning, research and work environments.	% of Classrooms with technology rated tier 3 or above	Increase from 2%	**15%[a]**
	% of Classrooms with technology rated tier 2 or above	Increase from 58%	**78%[a]**
	Accessibility to campus facilities (#Projects)	Cumulative Increase	**Between 5 and 18 projects per year[a]**
	Accessibility to campus facilities ($ investments)	Cumulative Increase	**Average annual investment: $1,462,838[a]**
	Develop and implement a new comprehensive master plan	Progress	Using Strategic Plan and LRCDP and developing supporting plans
S.3 Economic Resources: Increase and effectively allocate resources in support of the MSU Strategic Plan.	Align budgeting process with MSU Strategic Plan	Progress	**New model, investment pools**
	Improve efficiency and effectiveness of mission support processes	Progress	**Metrics systematically collected, all improving**
	Fiscal resources in support of the MSU Strategic Plan	Increase	**MSUAF, RED, Legislative requests, Performance Funding**

Table 1.7: cont.

S.4 Environmental Resources: Promote sustainable stewardship and a culture of resource conservation at MSU.	Greenhouse Gas Emissions (MT)	Decrease from 57356	**49975[a]**
	Diverted waste from landfill	Increase from 9.5%	**19.2%[a]**

Strategies/Programs	Spotlight
Merit, Market and Equity Faculty Salary Adjustments	Inclusion Cultivates Excellence Award
Promoting Sustainable Stewardship and a Culture of Resource Conservation	The Office of Sustainability
Emissions Reduction	The Smart Building Initiative
Investments in New Academic and Residential Facilities	LEED Certification
Investments in Instructional Facilities	
Investments in Research Facilities	
Investments in Infrastructure	

*Rationale for core theme indicators: For the Stewardship Core Theme (as steward of a land-grant institution, MSU will responsibly manage its human, physical, economic and environmental resources in an open and sustainable manner), objectives focus on:
- "human" – attract, develop and retain the best faculty and staff to achieve the MSU mission,
- "physical" – enhance aesthetic appeal and functional quality of MSU physical resources to support high quality learning, research and work environments,
- "economic" – increase and effectively allocate resources in support of the MSU Strategic Plan,
- "environmental" – promote sustainable stewardship and a culture of resource conservation at MSU.

Performance indicators then track performance in each objective: for example, attracting and retaining the best faculty and staff depends in part on competitive compensation, so MSU regularly compares salaries to comparable markets and positions. Developing the faculty and staff and helping them perform professionally requires that the university provide professional development opportunities, so MSU tracks the number of campus-based training sessions for faculty and staff and their enrollments.

**Results are based on 2016/2017 data unless followed by [a] which indicates most recent data available.

Data Sources: MSU Office of Planning and Analysis, CUPA and OSU Salary Surveys, Center for Faculty Excellence and HR Professional Development & Training, Campus Planning, Design, and Construction, Facilities Services, ADA Advisory Committee, Vice President of Administration and Finance, OpenMSU, Climate Action Plan, Office of Sustainability

Standard 2

RESOURCES AND CAPACITY

EXECUTIVE SUMMARY OF ELIGIBILITY REQUIREMENTS 4 THROUGH 21

Eligibility Requirement 4 – Operational Focus and Independence

Montana State University (MSU) is Montana's land-grant university with a focus on learning, discovery and engagement. The President of Montana State University is the chief executive officer and is responsible for administering board policies under the supervision and control of the commissioner of higher education (see BOR Policy 205.2). Montana State University has sufficient operational independence and is accountable and responsible for meeting the Northwest Commission's standards and eligibility requirements.

Eligibility Requirement 5 – Non-discrimination

Montana State University is committed to providing an environment that emphasizes the dignity and worth of every member of its community and that is free from harassment and discrimination based upon race, color, religion, national origin, creed, service in the uniformed services (as defined in state and federal law), veteran's status, sex, age, political ideas, marital or family status, pregnancy, physical or mental disability, genetic information, gender identity, gender expression, or sexual orientation. Such an environment is necessary to a healthy learning, working, and living atmosphere because discrimination and harassment undermine human dignity and the positive connection among all people at the University. Acts of discrimination, harassment, sexual misconduct, dating violence, domestic violence, stalking, and retaliation will be addressed consistent with this policy. Please see the MSU policy on Discrimination, Harassment, Sexual Misconduct, Dating Violence, Domestic Violence, Stalking and Retaliation for the complete text.

Eligibility Requirement 6 – Institutional Integrity

At MSU, institutional integrity is taken seriously and is exemplified in its policies and practices. MSU's Strategic Plan includes "Integrity" as one of four Values. Integrity is defined in the Strategic Plan as valuing "honesty and professionalism in all work. Each individual is personally accountable for his/her work and behavior."

The State of Montana has adopted a code of ethics and standards of conduct that apply to all state employees, including MSU administrators, faculty and staff. MSU applies and enforces these ethical requirements through its policies and procedures. MSU adheres to these standards through clearly defined policies that govern all aspects of MSU's operations and governance. Policies that govern student ethics and integrity are described in the Student Academic Conduct and Grievance Guidelines.

Eligibility Requirement 7 – Governing Board

The authorized governing board for MSU is the Montana Board of Regents (BOR), composed of seven voting members appointed by the Governor. The BOR is responsible for setting policy, approving academic programs, and approving the budget for the Montana University System. Those members serve seven year terms, except for the student member who serves a one year term. Members of the Board have no contractual, employment, or personal financial interest in MSU.

Eligibility Requirement 8 – Chief Executive Officer

MSU is currently guided by President Waded Cruzado, appointed by the Board of Regents, who is a full-time employee of the institution. The President does not serve as a member of MSU's governing board.

Eligibility Requirement 9 – Administration

Appropriate levels of administrative and support services are provided by MSU toward achievement of its mission and goals and core themes. Appropriate resources are committed in support of institutional goals and objectives, with the academic achievement of students and student success as the highest of priorities.

Eligibility Requirement 10 – Faculty

MSU employs full-time and part-time faculty, appropriate for the educational levels offered, including a core of full-time, professionally qualified faculty representing every discipline in which it offers major work. Through its organizational and governance structures, MSU faculty members are engaged in development of institutional policy and academic planning to further educational objectives. Faculty members are evaluated in a periodic and systematic manner and faculty workloads reflect the fundamental mission and goals of MSU.

Eligibility Requirement 11 – Educational Program

MSU offers baccalaureate, master's and doctoral degrees, in recognized fields of study consistent with its mission. Those degrees are granted through ten academic colleges, including Gallatin College and

The Graduate School, with appropriate levels of quality and rigor commensurate with the degree offered. The programs are structured with appropriate content and length, utilization of library and information resources, and levels of faculty-student interaction that help ensure program quality and alignment with MSU's mission and core themes.

Eligibility Requirement 12 – General Education and Related Instruction

All baccalaureate programs at MSU require the completion of a general education core curriculum (Core 2.0) with required elements in communication, quantitative reasoning, arts, humanities, natural sciences, social sciences, diversity, and a research/creative experience. These baccalaureate degrees additionally require a prescribed program of specialized study appropriate to each degree program. Gallatin College offers workforce programs and associate degrees that support MSU's mission by providing an accessible student-centered education that supports individuals' personal and professional goals and enhances Montana's economy.

Eligibility Requirement 13 – Library and Information Resources

Through the operation of its core library facility, Renne Library, and its centralized and de-centralized information technology resources, MSU provides services for students and faculty in support of educational programs, and the institutional mission, and core themes. Those resources are diverse, continually updated, and sufficient in breadth and depth to provide a quality learning experience. The library is continually evolving to best meet the needs of students, including distance learners, and faculty by providing online access to a vast digital collection and assistance.

Eligibility Requirement 14 – Physical and Technological Infrastructure

MSU has established written policies with respect to buildings, facilities, property, and physical infrastructure to ensure that appropriate and adequate resources are available to meet the core themes and mission. In addition, MSU has established policies regarding information and technological infrastructure which also support the core themes and mission. These policies are transparent and followed by MSU.

Eligibility Requirement 15 – Academic Freedom

Academic freedom is the cornerstone of fostering intellectual development and dialogue. MSU values and encourages the academic freedom of its faculty and students. Through its policies and practices, the university provides support for open dialogue among all constituencies and maintains an atmosphere of intellectual freedom and independence where expression and thought are not merely tolerated, but encouraged.

Eligibility Requirement 16 – Admissions

MSU is consistent in the application of and adherence to its student admissions and placement policies, and specifies the required qualifications for its undergraduate and graduate degree programs. In addition, the policies for transfer credits are appropriately documented. These policies and procedures are clearly documented on the MSU website and in printed materials, and the practices are congruent with Board of Regents policies.

Eligibility Requirement 17 – Public Information

Through a variety of electronic and printed sources, MSU disseminates current and accurate information to all constituencies regarding its mission and core themes. Significant effort is devoted to informing new and current students of admission requirements and procedures; grading policy; information on academic programs and courses; names, titles and academic credentials of administrators and faculty; rules and regulations for student conduct; rights and responsibilities of students; tuition, fees, and other program costs; refund policies and procedures; opportunities and requirements for financial aid; and the academic calendar.

Eligibility Requirement 18 – Financial Resources

MSU practices responsible, well-established financial planning and development in support of its mission and goals, by demonstration of an annual balanced budget for general operating funds, and an appropriate level of debt service.

Eligibility Requirement 19 – Financial Accountability

The institution's financial records are externally audited on a regular basis by the Montana Legislative Audit Division. This division provides an audit report of unqualified opinion that includes findings and recommendations to the administration and governing board.

Eligibility Requirement 20 – Disclosure

The institution discloses to the Northwest Commission on Colleges and Universities (NWCCU) all information required for the purposes of evaluation and accreditation functions.

Eligibility Requirement 21 – Relationship with the Accreditation Commission

MSU accepts the policies and standards of the NWCCU, and agrees to comply with these standards and policies as currently stated or as modified in accordance with due process. MSU continues to be responsive to requests from the Commission for accreditation-based information, and agrees that the NWCCU may, at its discretion, make known to any agency or members of the public the nature of any action regarding its status with the Commission. MSU has been in operation since 1893 and has adhered to the standards of its regional accrediting body since its initial accreditation in 1932.

STANDARD 2.A: GOVERNANCE

2.A.1 The institution demonstrates an effective and widely understood system of governance with clearly defined authority, roles, and responsibilities. Its decision-making structures and processes make provision for the consideration of the views of faculty, staff, administrators, and students on matters in which they have a direct and reasonable interest.

Montana State University's system of governance facilitates the successful accomplishment of its mission and goals. The Board of Regents provides system wide policies and procedures for governance and organization.

In addition to MSU's policies and procedures of governance and organization, in 2010, President Cruzado invited more than 100 volunteers to design a new shared governance structure for the institution that would provide mechanisms and opportunities for the involvement of faculty, students and staff in decision-making. Emerging from that process is a council structure that enables communication among the students, faculty, staff and administration on matters that impact these various constituencies. These councils are tasked with different areas of responsibility and are advisory to the President. This shared governance structure aligns with the student, faculty and staff senates and the professional council by having representatives from those groups sit on the councils. Each of the employee and student groups also maintains its own representative organizations (ASMSU , Faculty Senate, Professional Council, and Staff Senate) that are responsible for appointing members to the governance councils on which they have representation.

Institutional planning at Montana State University is a highly integrated and collaborative process. Overseen by the highest administrative levels, the process of institutional planning incorporates data, recommendations, and observations from departments and programs around campus. The information flows from colleges to Dean's Council, Faculty Senate, Professional Council, ASMSU and Staff Senate and is provided to the Planning Council, Outreach & Engagement Council, Budget Council, University Council and ultimately to the President's Executive Council. This interwoven network of councils and senates facilitates communication among administrators, faculty, staff and students and ensures that multiple perspectives will be brought forward on every issue, and provides a means for the views of faculty, staff, administrators and students to be part of the decision making process.

In addition to the council structure described above, organizational charts outline the hierarchical reporting structures for MSUs central administrative offices. President's direct reports make up the President's Executive Council. The council is advisory to the President and includes the leadership from all the units that report directly to the President, as well as representation from student and faculty senates. This group provides the President a sounding board for more informal discussion.

2.A.2 In a multi-unit governance system, the division of authority and responsibility between the system and the institution is clearly delineated. System policies, regulations, and procedures concerning the institution are clearly defined and equitably administered.

The Montana Board of Regents of Higher Education (BOR) has full authority and responsibility to supervise and manage public higher education in the state as established under the Constitution of the State of Montana. The Montana University System (MUS) is comprised of sixteen public universities and colleges. The MUS is a multi-unit system composed of two units, Montana State University and the University of Montana. Affiliated colleges under Montana State University include: Gallatin College at MSU Bozeman, MSU Billings, City College at MSU Billings, Northern, and MSU Great Falls College.

The BOR policies covering the authority and responsibility between the BOR, Office of the Commissioner of Higher Education (OCHE), and the individual institutions and units are clearly established. OCHE is the central administrative unit of the Montana University System and the Board of Regents. The Commissioner of Higher Education, and OCHE staff, are responsible for providing quality and timely service to the Board of Regents, government entities including the executive and legislative branches, the public and the media, students and staff, and others in the education community when they request information or assistance.

Typically, communication from OCHE goes directly to the President of MSU who then distributes the information to the chief executive officers (CEOs) of the affiliate institutions listed above. However, there are also times when communications are conveyed to the President of MSU and the affiliate institutions simultaneously.

BOR Policy 205.2.1 establishes the division of authority of the CEOs of the affiliated colleges of MSU-Northern, MSU-Billings, and Great Falls College – MSU, and the President of MSU. This policy also clearly establishes the reporting relationship of the CEOs of MSU-Northern, MSU-Billings, and Great Falls College - MSU to the President of MSU. Each institution within the MSU system has chosen to participate in a separate accreditation process, and is separately accredited by NWCCU.

2.A.3 The institution monitors its compliance with the Commission's Standards for Accreditation, including the impact of collective bargaining agreements, legislative actions, and external mandates.

An Associate Provost in the Office of Academic Affairs at Montana State University serves as the accreditation liaison officer (ALO) at Montana State University and monitors compliance with the Northwest Commission on Colleges and Universities' (NWCCU) Standards for Accreditation. As the ALO, the Associate Provost takes the lead for this monitoring, is responsible for organizing the preparation of reports, and advises the University president on matters pertaining to the University's accreditation. In this role, the ALO also coordinates the attendance of other appointed individuals on campus at NWCCU workshops, submits substantive change forms, submits annual reports, and leads and coordinates the drafting of self-studies or reports to maintain compliance with all NWCCU Standard.

Governing Board

2.A.4 **The institution has a functioning governing board consisting of at least five voting members, a majority of whom have no contractual employment, or financial interest in the institution. If the institution is governed by a hierarchical structure of multiple boards, the roles, responsibilities, and authority of each board – as they relate to the institution – are clearly defined, widely communicated, and broadly understood.**

The governance and administration of the Montana University System is vested with the Montana Board of Regents, which has full power, responsibility, and authority to supervise, coordinate, manage and control the Montana University System, and supervise and coordinate other public educational institutions assigned by law. The BOR's meeting schedule, agendas, minutes, and videos, and agenda handbook are available on the BOR website.

The Board consists of seven members appointed by the Governor, and confirmed by the Senate, to seven-year overlapping terms. The names, biographical information, and term of service for the current BOR members are available on the BOR website. One of the members of the board is a student appointed by the Governor who is registered full-time at a unit of higher education under jurisdiction of the board. The length of the term of the student member is one year, with the possibility of reappointment to successive terms.

The Governor, Superintendent of Public Instruction, and the Commissioner of Higher Education are ex-officio members of the Board.

MUS Board members may not have any contractual, employment, or financial interest in Montana State University or any other MUS institution, as stated in the Code of Expectations for the Montana Board of Regents of Higher Education.

2.A.5 **The board acts only as a committee of the whole; no member or subcommittee of the board acts on behalf of the board except by formal delegation of authority by the governing board as a whole.**

The Board of Regents of the Montana University System discharges its constitutional responsibilities through policies and administrative rules and regulations, which outline the formal delegation of authority by the BOR, and are consistent with standards set forth by NWCCU.

The creation, membership, and operating rules of the BOR are set forth in its bylaws. The bylaws outline the objectives, membership, and officers of the BOR. Article V of the bylaws specifically outlines the protocol and procedures for conducting BOR meetings. The bylaws also establish the parliamentary procedures to be utilized during meetings. Items before the BOR are decided by majority vote of the members present, and a quorum consists of a majority of the appointed members. Items are brought before the BOR in accordance with the procedures as set for in the bylaws. As previously discussed in 2.A.4, the BOR meeting schedule, agendas, agenda items, minutes, videos, and summaries of the meetings are available on the BOR website.

2.A.6 The board establishes, reviews regularly, revises as necessary, and exercises broad oversight of institutional policies, including those regarding its own organization and operation.

The Montana Board of Regents (BOR) Policy 103 delegates responsibility for the development, issuance, and maintenance of policies to the BOR's chief legal counsel.

The BOR Policy 219 requires the BOR to review each Montana University System (MUS) campus' Mission Statement every three years. Moreover, this policy requires the BOR to approve any changes in the Mission Statements and maintain current copies of such statements. All major academic program changes, including degrees, certificates, and diplomas, are forwarded to the Office of the Commissioner of Higher Education (OCHE), which then formulates a recommendation to the BOR.

Pursuant to BOR Policy 705.1, the BOR must conduct the periodic review of its organization and operations. BOR Policy 705.1.D requires the board to conduct a self-study of its stewardship every three or four years. BOR Policy 705.1.F mandates that the commissioner and BOR shall participate in a comprehensive joint-review process conducted by external consultants at least once in every five-year period of the commissioners' incumbency, or as the BOR shall determine.

The Academic, Research, and Student Affairs Committee, which is a sub-committee of the BOR, is responsible for the review of existing policies, as well as recommendation of new policies pertaining to academic proposals and coordination of institutional data in the academic, research and students affairs.

The MUS Strategic Plan sets forth an agenda for higher education in Montana by delineating the strategic directions, goals, and objectives that guide the MUS. In July 2006, after several years of study, public dialogue, and internal deliberations, the BOR approved the Strategic Plan. Since then, updates have occurred annually, including revisions to strategic initiatives as well as a refreshing of the data within each goal.

2.A.7 The board selects and evaluates regularly a chief executive officer who is accountable for the operation of the institution. It delegates authority and responsibility to the CEO to implement and administer board-approved polices related to the operation of the institution.

The President is the chief executive officer accountable for the operation of Montana State University. The President is appointed by the BOR under the authority of BOR Policy 205.1. The duties and responsibilities of the President are clearly outlined in BOR Policy 205.2, which states:

A. The president of a unit of the Montana university system is the chief executive officer at that unit and is vested with the responsibility of administering board policies under the supervision and control of the commissioner of higher education.

B. Each president is under the direction of and is responsible to the commissioner of higher education. Presidents are appointed by the board of regents upon the advice and recommendation of the commissioner.

BOR Policy 705.2 sets forth the requirements of the President's annual performance review. In the spring of each year in open session of the board's meeting, each president will review with the BOR and OCHE institutional activities during the past year and also institutional goals and objectives for the coming year. The BOR and OCHE will review the president's personal performance during the past year and indicate any specific matters they wish to have addressed during the coming year.

2.A.8 The board regularly evaluates its performance to ensure its duties and responsibilities are fulfilled in an effective and efficient manner.

As previously discussed in 2.A.6, the BOR conducts regular reviews of its operations, policies, and procedures to meet the goal of having exceptional leadership throughout the Montana University System who "benefit professionally and personally from constructive reviews of how we exercise our responsibilities." BOR Policy 705.1 establishes the timeline and requirements of these performance reviews to ensure the BOR fulfills its duties and responsibilities in an effective and efficient manner. Specifically, BOR Policy 705.1.D requires the board to conduct a self-study of its stewardship every three or four years, which includes a written assessment from all board members. BOR Policy 705.1.F mandates that the commissioner of higher education and BOR shall participate in a comprehensive joint-review process conducted by external consultants at least once in every five-year period of the commissioner's incumbency, or as the BOR shall determine.

Leadership and Management

2.A.9 The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of responsibility and accountability, who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.

The Montana State University administration is organized to support the institution's mission and the functions of the university. The President's Executive Council (PEC) includes the six Vice Presidents, as well as Directors of institutional level units that report directly to the President (Administrative Organizational Charts). The Chief Human Resources Officer, who reports to the Vice President of Administration & Finance, is also a member of the PEC.

PEC Membership:
- President
- Executive Vice President for Academic Affairs and Provost
- Vice President for Administration and Finance
- Vice President for Research and Economic Development
- Vice President for Student Success
- Vice President for Agriculture and Director, Montana Agricultural Experiment Station
- Vice President of Information Technology
- Director, Bobcat Athletics
- Director, Institutional Audit and Advisory Services
- Director, MSU Extension

- Legal Counsel
- Director, Planning and Analysis
- Executive Director, University Communications
- Director, Museum of the Rockies
- Director, Institutional Equity
- Chief Human Resources Officer

The Vice Presidents and other members of the PEC serve central roles on the seven governance councils, each with its own areas of responsibilities and each informed by the University Strategic Plan. The PEC members become a conduit for clear communication to the governance councils, as well as communication from those councils back to the Executive Council, in order to plan, organize, and manage institutional advancement.

The academic colleges and the library are administered by qualified deans who were hired in national searches, who are equipped with appropriate levels of responsibility and accountability, and who have opportunities to plan, organize, and manage their units and advise the provost and president.

2.A.10 **The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive officer may serve as an ex officio member of the governing board, but may not serve as its chair.**

Dr. Waded Cruzado is MSU's 12th president. Dr. Cruzado reports to the Montana University System Commissioner of Higher Education. She does not serve on the Board of Regents, the official governing board. Dr. Cruzado leads MSU as its full-time president. With a PhD in literature, her career includes traditional progression through the faculty and administrative ranks. She was formerly dean, provost and interim president at New Mexico State University. She holds tenure in Modern Languages and Literatures at MSU. As examples of national and regional respect for her leadership, she serves on the Board of HERS (Higher Education Resource Services), as president of the Big Sky Athletic Conference, and on the Association of Public and Land-grant Universities Board of Directors. In 2012, President Barack Obama appointed President Cruzado to the Board for International Food and Agricultural Development (BIFAD).

2.A.11 **The institution employs a sufficient number of qualified administrators who provide effective leadership and management for the institution's major support and operational functions and work collaboratively across institutional functions and units to foster fulfillment of the institution's mission and accomplishment of its core theme objectives.**

MSU has an administrative structure that is well suited for its mission and for accomplishment of its core theme objectives. Qualified senior administrators and deans are generally hired through national searches with explicit required qualifications. Internal candidates with suitable qualifications may be promoted to leadership roles, if appropriate to the position.

The administrative structure is designed to provide sufficient number of effective leadership positions to support the operational functions of the university. Deans serve as the academic leaders of their disciplinary clusters of departments and programs, with support from Associate and Assistant Deans and Department heads. Leaders work collaboratively across units on shared projects wherever appropriate to meet the strategic plan's goals and objectives.

Once a month members of the President's Executive Council; the deans; leaders from the Faculty Senate, Staff Senate, and Professional Council; along with the chancellors of the three affiliate campuses (MSU-Billings, MSU-Northern, and Great Falls College MSU); meet as the University Council. The goal of this Council is to ensure that institutional policies and procedures support the university's strategic plan and land grant mission. At this meeting, policies and reports of general institutional information are discussed and acted upon. It is the responsibility of the University Council members to establish and maintain reciprocal communication with their constituent groups regarding programs, policies and procedures that have campus wide impact. These meetings foster collaborations that ensure that the institution operates efficiently and effectively.

Policies and Procedures

Academics

2.A.12 Academic policies – including those related to teaching, service, scholarship, research, and artistic creation – are clearly communicated to students and faculty and to administrators and staff with responsibilities related to these areas.

At MSU, academic policies are made available and communicated to members of the campus community in multiple ways. First, the MSU Policies and Procedures webpage is accessible to the campus community and the public. This centralized location organizes policies by topic, and includes links for the Faculty Handbook. All resources found on the MSU Policies and Procedures web page are fully searchable.

The collected policies include:
- Governance and organization
- Academic affairs
- Research and public service
- Student success
- Personnel, including the Faculty Handbook
- Financial affairs
- Physical Plant (facilities, grounds, parking, vehicles, etc.)
- Enterprise information technology
- Guides and guidelines
- Policy on policies

This webpage represents the continuing efforts to enhance accessibility, ease of use, and communication to the members of the campus community and the general public.

Both the print and online version of the MSU Course Catalog outline academic policies for faculty and students. The following is a representative example of academic policies that are communicated to faculty and students through multiple avenues:
- Academic and Conduct Guidelines
- Student Code of Conduct
- Alcohol, Drug, and Tobacco Policy
- Common Hour Exam Policy
- FERPA Notification
- Title IX
- Office of Institutional Equity
- Conduct Guidelines and Grievance Procedures for Students

Guidelines, policies, and procedures for faculty annual review, retention, tenure and promotion, and post tenure review are available in the Faculty Handbook.

Prospective, new, and current students are informed of MSU policies through the MSU Course Catalog, which is available online and in print format. At check in during each orientation session, students receive a print copy of the current MSU Course Catalog for personal reference. Orientation leaders provide an overview of the information contained in the MSU Catalog, including where to find majors, degree requirements, and general policies. A paper copy of the MSU Catalog may be requested from the Office of Admissions, which will be sent in the mail.

The MSU Course Catalog outlines policies for admission and transfer, Core 2.0 requirements, degree completion requirements, and course descriptions. In addition, the MSU Course Catalog details programs of study for undergraduates and graduate students along with tuition and fee information.

2.A.13 Policies regarding access to and use of library and information resources – regardless of format, location, and delivery method – are documented, published, and enforced.

The MSU Library website is the portal for library, resources, services, and information access. The policies for borrowing privileges are detailed on the library webpage. This includes procedures for and enforcement of checking out and returning material, placing a hold, fines and overdue materials, as well as study room access and policy. The MSU Library Privacy Policies and enforcement are clearly stated and available on the Library website.

The MSU Library materials are fully searchable online in the Find tab of the homepage. This includes Articles & Research databases, Books & Media, Journals, Reserves, Digital Collections, Special Collections & Archives, Guides, and Scholar Works. The MSU library offers tutorials regarding the policies for plagiarism.

A detailed description of the policies related to the MSU Library Special Collections is available online. Policies and procedures for photocopy of this collection, procedures for photography duplication, and guidelines for the use of material in this collection are on the MSU Library website.

2.A.14 The institution develops, publishes widely, and follows an effective and clearly stated transfer-of-credit policy that maintains the integrity of programs while facilitating efficient mobility of students between institutions in completing their educational programs.

The policies governing the transfer of credit are clearly articulated in the MSU Course Catalog, both online and printed copy, in the sections entitled Transfer Students and Evaluation of Transfer Credit. Information about transfer credits is also available on the Office of Admissions Transferring to MSU page. As a helpful resource, students may utilize the Transfer Equivalency Guide, which provides an unofficial review of existing transcripts.

Official evaluations of transfer credits are processed by the Admissions Evaluator in the Office of Admissions, only after all official transcripts have been received for the applicant. The Admissions Evaluator determines the equivalency of the transfer course work to MSU in Bozeman. The Office of Admissions also determines which courses fulfill University Core requirements. Catalogs are used to determine course level and content. The transfer course description is compared to the MSU course description. Courses generally matching in credit amount, level, and content are considered equivalent. Courses not matching are granted elective credit or elective credit with core.
Credits also may be granted for prior preparation based on performance on a College Level Examination Program test (CLEP) and approval of the academic department. Credit awarded for the CLEP exams will not count toward University CORE requirements.
Military experience will be considered for credit upon receipt of official military transcripts. American Council for Education recommendations are considered when credit is requested for specific courses. Otherwise the credit counts as elective credit only.
Prior Learning Assessment (PLA): In 2015, the BOR adopted Policy 301.19 on prior learning assessment. In March 2017, the MUS Prior Learning Assessment Task Force made expanded policy recommendations for implementation within the MUS system.

Students

2.A.15 Policies and procedures regarding students' rights and responsibilities – including academic honesty, appeals, grievances, and accommodations for persons with disabilities – are clearly stated, readily available, and administered in a fair and consistent manner.

MSU's policies and procedures regarding Student Rights and Responsibilities are readily available, and link to many other student resources. This document outlines student rights, and provides links for the student bill of rights and student responsibilities and the Student Conduct Code.

MSU's Student Code of Conduct is regularly reviewed by the Dean of Students to ensure compliance with all applicable federal and state regulations. In 2014-2015, MSU completed a comprehensive review and revision of the University's Student Code of Conduct, which included unifying all departments that respond to conduct code violations and student grievances, as outlined in the Student Code of Conduct policies. The MSU website centralized access to information about the Student Code of Conduct on the Know Your Code page. These changes enhance consistency in how the University applies rules and student standards of behavior both inside and outside the classroom.

MSU also developed a Student Rights and Responsibilities website specifically for students to enhance their access to the campus rules and expectations, including a new Student Bill of Rights. The Student Code of Conduct is also available in the MSU Course Catalog.

Section 600.00 of the Student Code of Conduct explains procedures and rights in the student conduct process. Student Conduct proceedings are conducted with fairness and due process rights, which assure written notice and a hearing before an impartial board or hearing officer. No student will be found in violation of the MSU Code of Student Conduct without a determination that is more likely than not that a policy violation occurred. Any sanctions will be proportionate to the severity of the violation and to the cumulative conduct history of the student.

The Know Your Code webpage organizes information for students, parents, and faculty and staff. Links are provided to the Conduct Guidelines and Grievance Procedures for Students along with an explanation of conduct charges. There is also an explanation of possible sanctions. At each orientation, there is an in-depth discussion of student conduct and academic integrity.

Section 200 of the Student Code of Conduct provides procedures for student complaints about instruction.

2.A.16 **The institution adopts and adheres to admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills, and abilities to assure a reasonable probability of student success at a level commensurate with the institution's expectations. This policy regarding continuation in and termination from its educational programs – including its appeals process and readmission policy – are clearly defined, widely published, and administered in a fair and timely manner.**

MSU's policies on admissions and placement information for new freshmen, returning, and transfer students can be found in the Catalog as well as the Admissions website. These pages clearly outline the admissions requirements that guide the enrollment of students to MSU.

MSU's has adopted and adheres to an admission policy for both its undergraduate and graduate programs. Information on all undergraduate admissions can be found on the Office of Admissions website. Information about the policies and procedures that govern the graduate school admissions, the appeals process, and readmission are on the Graduate School website. In addition to the minimum requirements, each department or academic unit may require additional (or more rigorous) admissions materials. These additional requirements are approved and enforced through the regulatory power of The Graduate School. Information on specific graduate programs and their requirements can be found in the Graduate School section of MSU's catalog.

MSU also has policies and procedures that guide the placement of students in courses and programs based upon their academic skills. Such placement ensures a reasonable probability of success at a level commensurate with MSU's expectations. MSU new student placement policies and programs are implemented as part of the new student orientation programs with direction from the applicable departments. Placement into Math and English can be accomplished via the ACT, SAT, or by taking

the Math Placement exam or Writing Placement exam, which is provided during orientation. Passage of the Math Placement Level Exam (MPLEX) will satisfy the mathematical prerequisite requirements for math, statistics and related courses. Placement policies, as explained on the Department of Mathematical Sciences website, are strictly enforced to help students achieve success in math coursework.

Policies also exist for appropriate language level placement for those wishing to study a foreign language at MSU. Foreign language placement is outlined on the Placement Exams page on the Office of Admissions webpage. Special provisions are made on a case-by-case basis with faculty approval.

For undergraduate students who are not in good academic standing, the policy for continuation and termination from the educational programs, including the appeals process and readmissions policy, are clearly defined, widely published, and administered in a fair and timely manner on the University Studies website. (When a student's semester or cumulative grade-point average falls below the 2.0 threshold of academic good standing, the student's performance record is reviewed by the University Scholastic Appeals Board. Students who are suspended from MSU may follow the appeal process. The policies and procedures associated with graduate students not in good standing can be found on the Graduate School's Grades and Academic Standing website.

2.A.17 The institution maintains and publishes policies that clearly state its relationship to co-curricular activities and the roles and responsibilities of students and the institution for those activities, including student publications and other media, if offered.

MSU maintains clear policies with respect to co-curricular activities and the roles and responsibilities of students and the institution. The Registered Student Organization Manual and Policies, which guides student organizations, is available on the Office of Student Engagement (OSE) policy website page. Key policy components include student organization responsibilities, club guidelines, advisor responsibilities, travel, funding, and alcohol/drug policies. OSE provides and facilitates student engagement opportunities for MSU students through a variety of programs, events, services, and activities.

The Associated Students of Montana State University (ASMSU) provides numerous services to its student members, who pay the student activity fee. ASMSU is the voice for student concerns to the MSU Administration, the Montana University System, the Board of Regents, the Montana Governor, and the Legislature. The ASMSU policies and governing documents are on the MSU website.

ASMSU funds and oversees the student newspaper, the EXPONENT. The EXPONENT is governed by the Exponent Publications Board comprised of student leaders, Dean of Students, Director of Student Engagement, and community advisor. ASMSU aslo funds and oversees a scommunity radio station, KGLT (licensed under the BOR). Two elected student Senators serve on the Friends advisory committee.

BOR policy 506-2 identifies the roles and responsibilities for student publications, and the ASMSU Constitution further states:

> Expression II-vi
> Students shall be free to express opinions. Students shall be free to support causes by orderly means. Student publications may be distributed on campus provided such distribution does not disrupt the operations of MSU-Bozeman. Students' media is to be free of censorship. This editorial freedom shall entail a corollary obligation under the canons of responsible journalism and applicable regulations of the Federal Communications Commission. Opinions expressed in or by student media shall not be interpreted as official university or ASMSU policy.

Human Resources

2.A.18 The institution maintains and publishes its human resources policies and procedures and regularly reviews them to ensure they are consistent, fair, and equitably applied to its employees and students.

Montana State University is part of the Montana University system. As such, MSU is subject to several layers of personnel policies. The first level includes those policies set forth by the Board of Regents, specifically Section 700, related to Personnel, and Section 800, which addresses compensation. The University maintains its own personnel policies, which can be found in the Personnel Policy and Procedures Manual. These provide general guidance for all employees. These policies are maintained by Human Resources (HR) and publicly available on the university website.

MSU Human Resources is in the process of revising the MSU Personnel Policies and Procedures Manual, and has already made several updates through the University Council (see Status of Proposed Policies). The goal is to ensure that all policies reflect best practices in the field of human resources, and to address new areas, such as policies to address Work-Life integration through the activities of the ADVANCE Project TRACS funded by a National Science Foundation (NSF) grant. Administrators, faculty members, and classified and professional employees are collaborating to review and consider these revisions. A discussion of human resource policies adopted under the ADVANCE Grant is found on the project webpage. It is anticipated that this project will be completed no later than July 1, 2018.

In addition to human resource policies and procedures that cover all MSU employees, there are fourteen active union units on campus, and the contracts are typically open for negotiation every other year. HR is responsible for ensuring that the terms and conditions contained in the contracts are in alignment with general policies, with the understanding that each contract contains special conditions.

2.A.19 Employees are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion, and terminations.

Consistent with this standard, all employees are provided with a "Letter of Hire", which represents the basic terms and conditions of their employment. They are also notified of the policies, contracts, and other documents that will govern their employment.

Classified
Classified employees are given their assignments through their position descriptions, which reflect the necessary duties as lined out in the hiring documents. Position descriptions are updated as needed to reflect changing work conditions. Criteria and procedures for annual evaluations, promotions, disciplinary actions, grievances, and termination are addressed by the Personnel Policies and Procedures Manual available on the MSU human resources website. Compensation information can be found in the MUS Staff Compensation Plan, last updated in January 2008. These guidelines include procedures that cover, for example, the creation of career ladders and/or progression plans. Represented employees are notified that they are covered by a Union, and are provided with the link to their contract. Their conditions of employment, work assignments, rights and responsibilities and criteria and procedures for evaluation, discipline and grievance will be covered in these documents.

Professionals
Terms and conditions of employment for contract administrators and professionals at MSU are described in Board of Regents (BOR) policies 711.1 and 711.2.

Tenurable Faculty (Excluding those working for Gallatin College)
The expectations for tenurable faculty reside in the Faculty Handbook. This addresses their general work conditions, especially as they relate to evaluations. Faculty are expected to fulfill their tri-partite expectations of Instruction, Scholarship and Service. These are represented as a percentage of effort, which is generally assigned at hire. Each year these percentages can be evaluated and changed, according to the process outlined in the Faculty Handbook.

Gallatin College Faculty
All tenure-track faculty and qualifying non-tenure-track faculty employed by Gallatin College are covered by the Collective Bargaining Agreement. They are notified of their relationship to the Union and provided with a link to the contract. The contract identifies the terms and conditions related to evaluations, retention reviews, tenure and promotion.

Non-tenure-track faculty
Non-tenure track (NTT) faculty receive a Letter of Appointment, which clarifies the conditions associated with that appointment. Those NTTs who are covered by the Collective Bargaining Agreement are notified that they are in a bargaining unit, and are provided with access to the Collective Bargaining Agreement. The Collective Bargaining Agreement covers evaluations and promotions in title, as well as the compensation agreement. NTT who are not in a bargaining unit are covered by the conditions listed in the hire letter and general policy. It is not required that they have an annual evaluation.

Graduate Students on appointments

The primary work expectations for graduate students are provided by the department or the principal investigator who has granted them the appointment. The Collective Bargaining Agreement for graduate assistants covers the basic terms and conditions, including the evaluation requirement and basic compensation requirements. There is no opportunity for advancement in this cohort.

Human Resources maintains the forms and instructions for annual performance evaluations for all classified and professional employees. In addition, HR offers supervisory training on conducting performance evaluations. These are conducted on an annual basis, to coincide with the evaluation timelines. These timelines are available on the MSU Human Resources (HR) website.

2.A.20 The institution ensures the security and appropriate confidentiality of human resources records.

MSU is committed to the safety and security of its employees, on all levels. The university uses a multi-layered approach to ensure the confidentiality, availability, and integrity of human resources records including a robust server and network architecture, a maturing vulnerability management program, and strict access and authorization controls. Policies regarding the security and confidentiality of records are addressed system-wide in the MUS system wide directive on general record retention schedule. Access to confidential documents is restricted, and the files are kept secured in locked files within HR. In addition to these documents, the department provides for the long-term storage of older files. These files are secured, and are located on University property, within fenced confines (with limited and regulated access).

The policies and procedures related to data stewardship and technology management help MSU in maintaining the confidentiality, integrity, and availability of MSU data. MSU expects all stewards and custodians of its administrative and research data to manage, access, and utilize this data in a manner in accordance with the policy to protect against misuse while providing for appropriate use, balancing the three core values of availability, integrity, and confidentiality.

Institutional Integrity

2.A.21 The institution represents itself clearly, accurately, and consistently through its announcements, statements, and publications. It communicates its academic intentions, programs, and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to assure integrity in all representations about its mission, programs, and services.

MSU is committed to open, honest, and direct communication with students, faculty, staff, and the public regarding the operations of MSU and its accomplishments, achievements, and challenges. Officials and employees who produce these formal representations have the responsibility to ensure that they are consistent, clear, and accurate. Such offices and individuals include:

- University Communications, which manages MSU communications with print, visual, web and digital communication.
- Registrar's Office, which has oversight for information contained in the annually reviewed and updated MSU Course Catalog, posted on MyInfo , and published in course schedules;
- Office of the President and the Vice Presidents, which have the authority to send announcement emails to faculty and staff;
- Office of Planning and Analysis, a unit that conducts both descriptive and analytical studies that represent the work of the university to internal and external constituencies.

The MSU Course Catalog clearly identifies the requirements and expectations of its academic programs and provides recommended schedules for timely completion of degree programs, including four-year graduation plans for all baccalaureate degrees. The University Courses and Curricula are reviewed annually, and updates are submitted directly to Courseleaf (a content and curriculum management software) by departments.

The Registrar's Office reviews necessary catalog copy changes as part of the curriculum approval process. The catalog accurately reports the university's accreditation status with NWCCU. University Communications, which reports to the President, serves as the liaison between the university and the media. Communications staff coordinate interview requests, handle publicity, including news releases, to convey the university's programs, direction, services and accomplishments to students and the public at large. Communications is also responsible for creation and oversight of the university's brand, which includes graphic identity management and standards for online and print materials. This office works to ensure the quality, accuracy, and consistency of online and print materials by providing oversight and training for official university websites and overseeing a release policy for print materials. Divisions, colleges, and departments may design and order their own materials, which are reviewed by their respective colleges to assure consistency.

MSU Police Services offer an emergency messaging system to faculty, staff, and students. Police Services use MSU Alert, which is a notification system that delivers critical information. The system sends a text and/or email message to all enrolled cell phones and email accounts in the event of an emergency at the university.

All official, institutional, local, and personal webpages represent MSU; therefore, all information presented must comply with existing law and university policy, including the Enterprise Information Technology Policies and Graphic Identity and Branding Policy, which covers web format and content.

2.A.22 **The institution advocates, subscribes to and exemplifies high ethical standards in managing and operating the institution, including its dealings with the public, the Commission, and external organizations, and in the fair and equitable treatment of students, faculty, administrators, staff, and other constituencies. It ensures complaints and grievances are addressed in a fair and timely manner.**

At Montana State University, institutional integrity is taken seriously and is exemplified in its policies and procedures. The relationship between the university and its constituents is the foundation upon which the university's reputation is built. MSU is guided by its values, which include integrity, the value of honesty, and professionalism in all work.

State law and the policies of the Montana Board of Regents and Montana State University, govern the behavior of all MSU employees. These laws and policies are communicated to, and form the basis of, the expectations for faculty, staff, students and the public in its interaction with the university.

State Law
The State of Montana has adopted a code of ethics and standards of conduct that apply to all state employees, including university administrators, faculty and staff. MSU applies and enforces these ethical requirements through its policies and procedures. The standards of conduct applicable to state employees in Montana can be found in Title 2, Chapter 9, Montana Code Annotated. These statutes "set forth a code of ethics prohibiting conflict between public duty and private interest as required by the constitution of Montana."

Board of Regents Policy and Procedures
The Montana Board of Regents maintains a written Policy and Procedures Manual, which includes all policies applicable to the units of Montana University System. These policies provide the framework for the university's policies. These policies articulate a balanced and fair approach for the university's dealings with the public, its students and its employees. These policies are adopted and, when necessary, revised by the Board of Regents of the State of Montana.

Montana State University Policies and Procedures
MSU maintains written policies and procedures that govern all aspect of the university's operations and governance. These policies are adopted through a campus wide procedure that allows for dissemination of proposed policies for campus comment and opportunities to propose new or revised policies. MSU provides guidance and support for developing operating policies and procedures.

The professional and ethical behavior of faculty, classified and professional contract employees are addressed in the MSU Personnel Policies and Procedures Manual. Specific guidelines are given regarding sexual harassment, outside consulting, equal opportunity/affirmative action, and drug and alcohol abuse. Standardized employment procedures are provided for recruitment, hiring, training, probation, evaluation, retirement, and termination of employees.

Specific policies governing the ethical and professional standards of the faculty are found in the Faculty Handbook, which clearly outlines professional and ethical expectations for faculty and administration.

Policies governing student conduct, including the expectations of the university regarding matters of academic integrity are described in the Student Academic Conduct and Grievance Guidelines.

MSU has policies and procedures for the prompt and equitable resolution of complaints and grievances. Complaints and grievances raised by faculty, staff, students, and visitors are addressed promptly and equitably. There are several mechanisms available for members of the university community to pursue complaints and grievances.

The collective bargaining agreement (CBA) for non-tenured faculty contains grievance procedures for matters pertaining to the terms and conditions of employment for non-tenured faculty. Grievance procedures for the tenured and tenure-track faculty at Montana State University are outlined in the Faculty Handbook.

For those staff and faculty members who are members of a collective bargaining unit, each respective collective bargaining agreement contains a grievance procedure. For the non-union staff members, the university has established Grievance Procedures in the Personnel Policies and Procedures Manual.

Under the Conduct Guidelines and Grievance Procedure for Students, students are afforded the opportunity to file an Instruction Complaint and may file a grievance if they disagree with an academic decision, including assignment of grades or decisions about program or degree requirements or eligibility.

The university also has a Discrimination Grievance Procedure, which applies to complaints of discrimination, harassment, sexual misconduct, dating violence, domestic violence, stalking, or retaliation brought by faculty, staff, students and visitors.

MSU acts promptly to resolve all complaints. Complaints received by university offices are addressed by the office responsible for the program. If the party is dissatisfied, the complainant may continue to pursue the matter until the President makes a final university decision. If the complainant is dissatisfied after the final university decision, the BOR maintains an appeal process for appeal of campus decisions.

Collective Bargaining Agreements
The Office of the Commissioner of Higher Education also maintains a copy of all the collective bargaining agreements for Montana System Institutions. For Montana State University, these include Non Tenure Track, Gallatin College faculty, Classified, Craft, and Graduate Assistants.

MSU Compliance Hotline
The MSU Compliance Hotline was implemented in 2014. The compliance hotline is an independent avenue for confidential reporting of concerns about suspected legal, regulatory or policy violations. Reports submitted to the hotline are given careful attention by appropriate university administrators in the following areas: accounting and financial, athletics, discrimination or harassment, health and safety, human resources, information technology and security, and research. Reports on academic matters and non-academic student conduct matters are not accepted by the compliance hotline.

2.A.23 **The institution adheres to a clearly defined policy that prohibits conflict of interest on the part of members of the governing board, administration, faculty, and staff. Even when supported by or affiliated with social, political, corporate, or religious organizations, the institution has education as its primary purpose and operates as an academic institution with appropriate autonomy. If it requires its constituencies to conform to specific codes of conduct or seeks to instill specific beliefs or world views, it gives clear prior notice of such codes, and/or policies in its publications.**

All state employees are subject to state law, which includes statutes prohibiting specified conflicts of interest. The standards of conduct applicable to state employees in Montana can be found in Title 2, Chapter 2, Montana Code Annotated. These statutes define conflicts related to ethics, contracting activities, and nepotism, and set forth regulations prohibiting conflicts between public duty and private interest as required by the constitution of Montana.

The Montana Board of Regents has adopted a Code of Expectations that governs the conduct for board members, including conflict of interest concerns. All Montana University System (MUS) employees fall under BOR Policy 770 regarding conflicts of interest, which is intended to complement the state ethics statutes.

BOR Policy 770 requires each unit of the MUS to adopt a conflict of interest policy. This includes disclosures of conflicts by employees annually, whenever an actual or potentially conflicting interest is, or is about to be, acquired, and before submitting a proposal for grants or contracts. The policy also calls for the appointment of a compliance administrator and a process for resolution and/or management of conflicts.

All MSU employees are bound to the institutional Conflict of Interest Policy. This policy establishes MSU's commitment to fulfilling its mission with integrity and in full compliance with state, BOR, and federal ethics and conflicts of interest laws. "It is the policy of the University that in all of its activities—the education of students; the design, methods of analysis, interpretation, and reporting of research; the hiring and supervision of staff; the procurement of materials and services; and all other tasks incident to its mission—it shall endeavor to be free of undue influence or bias that may result from conflicts of interests." This policy, which applies to all university employees, sets forth guidance on identifying and managing potential conflicts of interests and requires annual disclosure of conflicts of interests for faculty and contract professional employees, such as nepotism or consulting by faculty or professional/staff.

A standing Conflict of Interest Committee meets on a regular basis to review Conflict of Interest Plans and address issues related to the Conflict of Interest Policy.

2.A.24 The institution maintains clearly defined policies with respect to ownership, copyright, control, compensation, and revenue derived from the creation and production of intellectual property.

MSU maintains clearly defined policies with respect to ownership of copyright, patents and electronic coursework as set forth by the Montana Board of Regents policy for copyrights and patents. All patentable inventions made in connection with assigned duties, utilizing MSU facilities and equipment or created under sponsorship providing for university ownership is considered MSU property. MSU must elect to acquire title to the invention or determine to return the intellectual property (IP) to the inventor within 18 months of disclosure. IP ownership and provisions may alternately be determined by terms of a sponsored agreement. Revenues received from patenting will first be used to pay a development fee to the university and to reimburse for patent costs accrued. The remainder will be divided 50:50 between the university and the inventors personally (Patent Policy).

Copyrightable materials will be owned by the university if the work was performed under a work-for-hire agreement or under a sponsored agreement that provides ownership to the university (Copyright Policy). All other works are considered scholarly and ownership accrues to the creator. Electronic course materials developed by faculty remain the property of the creator unless (a) the materials were created as part of a sponsored program, or (b) substantial institutional resources were used to create the materials. Ownership of Electronic Course Materials Policy can be found in BOR Policy 406.

For students involved in graduate or faculty research, the intellectual property policy is directed to the Office of the Vice President for Research and Economic Development and to the Technology Transfer Office. The Technology Transfer Office forms are available online.

The BOR defines the policy and procedures for University System Employee Equity Interest and/or Business Participation (BOR Policy 407). This process is further defined by MSU policy on Material Transfer Agreements (MTAs), which is administered by the Technology Transfer Office (TTO). This office is designated to review all academic and commercial MTAs for incoming material. The TTO is authorized to sign MTAs on behalf of the university, if they are acceptable under MSU's policies and consistent with MSU's academic mission.

Recognizing that teaching, research and public service are the primary responsibilities of faculty members in the Montana University System, it may be reasonable and feasible for faculty members to engage in consulting activities. The BOR has developed policy and procedures (BOR 401.1) for consulting activities conducted by faculty members, but leaves each campus of the MUS to adopt rules and regulations governing consulting activities (Faculty Handbook, Consulting).

2.A.25 The institution accurately represents its current accreditation status and avoids speculation on future accreditation actions or status. It uses the terms "Accreditation" and "Candidacy" (and related terms) only when such status is conferred by an accrediting agency recognized by the U.S. Department of Education.

The University provides its accreditation status online, including specialized accreditation by college, department, and/or program. A site dedicated to regional accreditation by the Northwest Commission on Colleges and Universities is also available online.

2.A.26 If the institution enters into contractual agreements with external entities for products or services performed on its behalf, the scope of work for those products or services – with clearly defined roles and responsibilities – is stipulated in a written and approved agreement that contains provisions consistent with the mission and goals of the institution, adheres to institutional policies and procedures, and complies with the Commission's Standards for Accreditation.

When the institution enters into contractual agreements with external entities for products or services, the scope of work for those products or services with clearly defined roles and responsibilities, is stipulated in a written and approved agreement containing provisions intended to maintain the integrity of the institution. In such cases, the institution ensures the scope of the agreement is consistent with the mission and goals of the institution, adheres to institutional and State of Montana policies and procedures, and complies with the Commission's Standards for Accreditation. The Office of Procurement Services provides guidance that includes links for bids and proposals, State Term Contracts, State Procurement Bureau, State Policies and Regulations, Requisition Time Schedule, Vendor Handbook and eMACS Vendor Registration. In addition, pre-approved forms and templates are provided for departmental use.

MSU has implemented robust policies and procedures regarding contracting with external entities. The policies and procedures regarding processing University contracts are set forth in the Procurement Policy and Procedures Manual. In concert with the Procurement Delegation Agreement with the State of Montana, these guidance materials describe MSU's clearly defined roles and responsibilities regarding authority for negotiating and signing contractual agreements.

Contracts with external entities for products and services with a value in excess of $25,000 are processed through Procurement Services, a department within University Business Services, which reports to the Vice President for Administration and Finance. Procurement officers have experience and education that qualifies them to perform contracting on behalf of the University. These individuals attend training hosted by both the University and the State of Montana specifically regarding contracting in the University setting.

Additionally, MSU has a system for delegation of contracting authority, which is described in detail in the Procurement Policy and Procedures Manual and the MSU policy on Purchasing Authority. These procedures and policy safeguards ensure that contractual agreements serve the mission and goals of MSU.

In consultation with MSU Legal Counsel, Procurement Services provides guidance on contracting to MSU Departments as needed. Exceptions to standard templates must be reviewed by MSU's Legal Counsel.

Academic Freedom

2.A.27 The institution publishes and adheres to policies, approved by its governing board, regarding academic freedom and responsibility that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.

Academic freedom is protected by a number of policies: BOR Policy 302 includes quoted material from the American Association of University Professors' (AAUP) statement of principles of academic freedom.

MSU recognizes that the freedom of expression is integral to the purpose and process of the University, whose primary goal is education in its Free Speech Policy. Therefore, no University policy or rule will infringe upon this constitutional right. This policy encompasses students, staff and administrators.

Academic Freedom is also outlined in Article 7 of the of the Collective Bargaining Agreement for Non Tenure Track Faculty (page 9), which clearly states Faculty members are entitled to freedom in the classroom**,** on campus, and off campus while in the course of fulfilling their obligations as University faculty members. For tenured and tenurable faculty, the principles of academic freedom are outlined in the Faculty Handbook under "Rights and Responsibilities," which reiterates BOR Policy 302:

> [Faculty members] are citizens, members of a learned profession, and officers of an educational institution. When they speak or write as citizens, they should be free from institutional censorship or discipline, but their special position in the community imposes special obligations. As scholars and educational officers, they should remember that the public may judge their profession and their institution by their utterances. Hence they should at all times be accurate, should exercise appropriate restraint, should show respect for the opinions of others, and should make every effort to indicate that they are not speaking for the institution.

2.A.28 Within the context of its mission, core themes, and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators, and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social, or religious philosophy, its constituencies are intellectually free to examine thought, reason, and perspectives of truth. Moreover, they allow others the freedom to do the same.

MSU takes the responsibility of promoting independent thought and the pursuit and dissemination of knowledge in an open and free environment seriously. The mission of the university identifies the importance of creating knowledge and art, and the integration of leaning, discovery, and

engagement. Along with the Core Themes Learning, Discovery, Engagement, Integration, Access, and Stewardship, MSU supports and affirms the freedom of faculty, staff, students, and administrators to engage in the intellectual exchange of thought.

As stated in 2.A.27, freedom of expression is explicitly stated and protected in the Free Speech Policy, the outline of Academic Freedom in the faculty handbook, and the Collective Bargaining Agreement for Non Tenure Track Faculty (page 9).

2.A.29 **Individuals with teaching responsibilities present scholarship fairly, accurately, and objectively. Derivative scholarship acknowledges the source of intellectual property, and personal views, beliefs, and opinions are identified as such.**

Faculty are public employees and are expected to abide by rules of conduct, which are outlined in Montana Code Annotated, 2015 2-2-103. In addition, MSU faculty are expected to abide by MSU's Ethical and Professional Standards and the faculty responsibilities as outlined in the Faculty Handbook. The ethical and professional standards include references to the Research Misconduct Policy. Complaints of alleged breaches of these standards are investigated using the procedures set forth in the university's Reporting Violations Policy and the Research Misconduct Policy as general guidelines. The procedures may be adapted as necessary to consider a specific complaint.

Finance

2.A.30 **The institution has clearly defined policies, approved by its governing board, regarding oversight and management of financial resources—including financial planning, board approval and monitoring of operating and capital budgets, reserves, investments, fundraising, cash management, debt management, and transfers and borrowings between funds.**

Within the BOR Policy and Procedures Manual, Section 900 – Financial Affairs, policies addressing financial affairs oversight and management of financial resources are clearly defined. These policies include financial planning, board approval and monitoring of operating and capital budgets, reserves, investments, fundraising, cash management, debt management, and transfers and borrowings between funds. In addition, the University follows generally accepted accounting principles and pronouncements, National Association of College and University Business Officers (NACUBO) guidelines, and College and University Business Administration (CUBA) guidelines.

The Board of Regents annually approves University budgets, including various reserve, transfers, debt, inter-entity borrowing and cash management reports. These annually-submitted reports encompass all funds of the University, with special attention focused on state appropriated and tuition funded expenditures. The Administrative, Budget and Audit Oversite Committee of the Board of Regents reviews and approves the long-range building plans for the University biennially, and approves all fees charged to students.

STANDARD 2.B: HUMAN RESOURCES

2.B.1. The institution employs a sufficient number of qualified personnel to maintain its support and operations functions. Criteria, qualifications, and procedures for selection of personnel are clearly and publicly stated. Job descriptions accurately reflect duties, responsibilities, and authority of the position.

MSU has increased staffing levels over the last 10 years along with enrollment growth, currently retaining a workforce of more than 4,000 employees. To fill new and replacement positions, MSU Human Resources uses broad search methods, including locally, statewide or nationally advertised (as appropriate) position vacancy announcements, to ensure the largest qualified pool of applications possible.

Hiring practices are transparent and consistent. Procedures for selection of personnel are outlined in the MSU Recruitment and Hiring Manual. Procedures for selection of contract types and contracts are defined by the MUS and consistently applied. Job descriptions use established templates that include duties, responsibilities and supervisory authorities of the position. Required and preferred criteria for specific positions are clearly outlined in the vacancy announcements, which are developed from job descriptions during the recruitment process. These same documents are used by search committees to build job-specific screening questions and as the basis for interview and reference questions.

Approval to advertise for new and replacement hires resides with the Provost for colleges and academic units and with the respective vice presidents for administrative units. MSU implemented an online Applicant Tracking System (ATS) in 2013. Effective in 2015, recruitment of all regular positions (faculty, professional and classified) is managed through the ATS tool, ensuring clarity and consistency of public information regarding available jobs and their requirements, as well as relevant application procedures and requirements.

2.B.2 Administrators and staff are evaluated regularly with regard to performance of work duties and responsibilities.

All employees are reviewed annually according to the appropriate policy for their contract type (Personnel Policies and Procedures Manual, Faculty Annual Review, Faculty Handbook).

In accordance with BOR Policy 705.2, the President is evaluated at least once every three years (see the response to Standard 2.A.7). Administrators other than the President, including the Provost, Vice Presidents, Vice Provosts, deans, associate deans, and others in administrative positions, are evaluated annually by their direct supervisor, as are classified and professional staff. Additionally, all administrators (including the President and Provost) are reviewed by the faculty through a process conducted by the Faculty Senate.

The Performance Evaluation Policy defines the process and requirements to assure regular evaluation of all MSU employees.

2.B.3 The institution provides faculty, staff, administrators, and other employees with appropriate opportunities and support for professional growth and development to enhance their effectiveness in fulfilling their roles, duties, and responsibilities.

Professional and leadership development appear in two Core Themes, Engagement and Stewardship, underscoring the importance of training and development at MSU. Two offices house formal professional development and leadership training. The Center for Faculty Excellence, supports the professional development of all faculty (tenure-track and non-tenure track) across all career stages in the areas of teaching, research/creative activity, outreach/service, and leadership. Guided by faculty interests and goals, and the values of innovation, collaboration, and partnerships, the Center is a place where faculty members connect to share knowledge and skills that support each other's growth.

Professional Development & Training (PD&T), housed in the Office of Human Resources, supports the professional development of classified and professional staff with programs extending to all employees. By providing ongoing personal and professional development opportunities, PD&T strives to increase MSU employee effectiveness and each employee's ability to excel and contribute to the overall MSU mission.

Specific long-term professional development opportunities include:

- Leadership Montana State University (LMSU): The Leadership MSU program focuses on knowledge about the university, its mission, and vision. The program is designed to help each participant network effectively with campus leaders, better understand how colleges and departments across the university work together and to develop leadership skills that will contribute to the strength of the university and our ability to carry out our mission.

- Developing Excellence in Academic Leadership (DEAL): DEAL's objective is to encourage best practices and collegial development of MSU's current and future academic leaders (such as department heads/chairs, assistant/associate deans, and academic research center directors) through highly interactive monthly workshops that allow participants to both explore a variety of substantive topics and create personal networks across disciplines and units at MSU..

- Sabbatical leave program: Opportunity for academic faculty who meet the guidelines for application. Programs or projects for sabbatical periods include research, travel, related work in other institutions or private or business organizations, or other activities that will improve the faculty member professionally, or that directly or indirectly benefit the campus and the state.

In addition, MSU provides financial support and departmental or institutional nominations for extended external training opportunities like HERS Leadership Training, Harvard Management, Leadership Montana, and discipline- or profession-based development programs. Participants sponsored by the university are generally expected to share lessons learned with a wider MSU audience upon return to add depth to the training opportunity and improve the institution as well as the individual.

2.B.4 Consistent with its mission, core themes, programs, services, and characteristics, the institution employs appropriately qualified faculty sufficient in number to achieve its educational objectives, establish and oversee academic policies, and assure the integrity and continuity of its academic programs, wherever offered and however delivered.

Faculty are recruited and hired primarily within their disciplines and departments. Faculty committees write the position descriptions and determine the qualifications for each open line and determine which candidates are appropriately qualified.

Upon hire, new faculty members self-report degree histories to Human Resources and the Office of Planning and Analysis, with independent verification conducted during the hiring process. In Fall 2016, MSU reported 84% of full-time and 20% of part-time faculty holding terminal degrees.

MSU has maintained a student: faculty ratio between 16:1 and 19:1 for the past 40 years. Long-term, sustained increases in student enrollment during that time have been followed by increased tenurable faculty lines, while decreases in enrollment are not generally followed by elimination of tenure lines, causing some lag and drag in that ratio. Currently, the student:-faculty ratio, as measured by Common Data Set (as described in Section I.) definitions, sits at 19:1. Student Full Time Equivalents (a conversion of student credit hours) to the instructional faculty Full Time Equivalents (based on the instructionally-funded portion of the faculty's appointments) has also been tracked and reported over time. That ratio has moved between 18:1 and 21:1 over the last 15 years, currently at 20:1. Departments and colleges use instructional ratios to propose additional faculty hires, and they are one criterion for evaluation of those proposals by the Deans and Provost.

In addition to regular instructional faculty who also conduct research and engagement activities, MSU employs faculty for primarily research and outreach functions through externally funded research appointments, Montana Agricultural Experiment Station (MAES) appointments, and Extension faculty appointments. Some faculty members have appointments that are funded through the instructional budget in part, and through one or both MAES and Extension. Faculty may also be fully funded through the agency budgets. In Fall 2016, MSU had 104.75 faculty FTE in MAES and 127.23 faculty FTE in Extension, including both fully and split funded faculty, both on campus and in research centers and Extension offices across the state. There were 29.93 non-tenurable research faculty FTE. Faculty numbers are reported annually in the MSU Institutional Report. Fall 2016 total faculty numbers, including split appointments and all funding sources, were 578 tenurable and 422 non-tenurable FTE.

The faculty have substantial authority and responsibility for the institution's educational objectives. This includes curriculum development as well as the delivery of existing academic programs. New course proposals go through a clearly defined process that is initiated by faculty and includes faculty review at the departmental curriculum committee, college curriculum committee, and the University Curriculum and Programs Committee before a review by Faculty Senate. New Program proposals go through a similar process of review by faculty and then are reviewed by the Dean's Council and the Provost before being submitted for approval to the Board of Regents and eventually to NWCCU if required.

2.B.5 Faculty responsibilities and workloads are commensurate with the institution's expectations for teaching, service, scholarship, research, and/or artistic creation.

A faculty member's letter of hire identifies the faculty member's initial Percentages of Effort (percentages of teaching, scholarship, and service), as well as more specific expectations of the faculty member's appointment.

Tenure and Tenurable Faculty
Workloads and assignments for tenured and tenurable faculty may be adjusted annually with agreement from the faculty member and the department head, in accordance with the Faculty Handbook to ensure that assignments are covered while balancing the needs of the faculty member.

Non-Tenure-Track Faculty
For Non-Tenured Track (NTT) faculty, assignments are described in terms of workload units in the collective bargaining agreement (Article 8: Workload). Full-time work is defined as 15 workload units per semester. Normally, workload units given for a teaching assignment will be equivalent to the credit assigned to the course (e.g., a three credit course will count as three workload units). Workload assignments are designed to account for the effort and time associated with pedagogical preparation, classroom presentation, assessment of student work, office hours, and informal interaction with students. For non-instructional assignments (e.g., committee service, formal academic advising, and administrative duties) one workload unit will represent, on average, 45 hours over the course of the contract. The department head, with approval of the Dean, may adjust workload units for a course based on criteria established by the College (e.g., workload associated with student enrollment, course format and availability of course support). Department Heads and/ or Deans will make every effort to seek input from faculty when adjusting workload units, but the instructional or non-instructional workload of NTT faculty will be based on the teaching, service, operational, or administrative needs of the department or college and shall be at the discretion of the department head.

2.B.6 All faculty are evaluated in a regular, systematic, substantive, and collegial manner at least once within every five-year period of service. The evaluation process specifies the timeline and criteria by which faculty are evaluated; utilizes multiple indices of effectiveness, each of which is directly related to the faculty member's roles and responsibilities, including evidence of teaching effectiveness for faculty with teaching responsibilities; contains a provision to address concerns that may emerge between regularly scheduled evaluations; and provides for administrative access to all primary evaluation data. Where areas for improvement are identified, the institution works with the faculty member to develop and implement a plan to address identified areas of concern.

Tenure and Tenurable Faculty Annual Review process can be found in the Faculty Handbook. The annual review assesses a faculty member's performance over the preceding calendar year, and is based upon the faculty member's letter of hire, assigned percentages of effort, annual assignments, annual productivity report and evaluations of teaching. Reviews must be completed by the date specified by the provost. The annual review with ratings and any written appeals to the review shall be included in the candidate's personnel file.

The annual review is an assessment of the faculty member's performance over a one-year period. This is in contrast to retention, tenure, and promotion reviews, which are based upon the cumulative performance of the faculty member in each area (teaching, scholarship, and service) over the time period appropriate to the review. Thus, a record of having favorable annual reviews does not guarantee the candidate has assembled and demonstrated a cumulative record that meets the standards for retention, tenure or promotion. The review process includes the following steps as outlined in part two, section annual review of the Faculty Handbook or MTYCFA CBA for Gallatin College tenured and tenurable faculty.

a. The faculty member and the department head and/or department annual review committee annually review the faculty member's performance relative to the faculty member's assigned percentages of effort and current assigned responsibilities. Reviews assess the faculty member's performance in each of the major areas of responsibility (teaching, scholarship and service) over the preceding calendar year. Student evaluations of teaching must be collected and considered in the evaluation of teaching.

If the faculty member has a split or joint appointment with 20% or more effort assigned to another unit, input from the other unit must be solicited and considered in the evaluation and rating of the faculty member.

For Extension Specialists within academic departments, the Director of Extension will provide the department head or reviewing committee a letter addressing the faculty member's work for Extension, which will be considered in the evaluation and rating of the faculty member's performance.

b. The department head and/or department annual review committee rates the performance of each faculty member in each area of responsibility and calculates an overall rating for the faculty member's performance for the year, weighted by the assigned percentages of effort using the Annual Review form approved by the Provost. The faculty member will be given a copy, or access to the completed form if created electronically.

c. The faculty member will have the opportunity to meet with the reviewer(s).

d. The head of the primary unit and the faculty member will develop goals and assignments for the next calendar year. The goals and assignments for individual members of the faculty will reflect departmental needs and professional opportunities consistent with departmental strategic plans or articulated departmental priorities.

e. If the assigned percentages of effort are inconsistent with the faculty member's current activities and levels of performance, a revision of the assigned percentages of effort should be discussed. If a modification of the assigned percentages of effort is made as outlined in part 4, section annual review of the Faculty Handbook, it will be documented using the Faculty Assigned Percentages of Effort Update form.

f. The faculty member and the dean will be provided with a copy of or access to the annual review, ratings and any revision of the assigned percentages of effort. Copies of all annual reviews and the performance ratings of each faculty member will be maintained in the faculty member's personnel file in the department. These files shall be kept confidential and maintained as outlined in the Faculty Personnel Files policy.

The Non-Tenure-Track CBA (Article 9: Non-Tenure Track Bargaining Unit Appointments, Evaluation and Advancement) outlines an annual performance evaluation process that requires that each home department annually review the performance of all NTT faculty who have contracted for at least 7.5 workload units (0.5 FTE) in any semester in the calendar year for which they are being reviewed and who are employed during the time of the annual review, or who are employed on a multi-year contract. All NTT faculty who are covered by the Collective Bargaining Agreement (CBA) receive a written evaluation, with criteria for evaluation clearly spelled out in the CBA. Gallatin College NTT are not includeing in the MSU NTT CBA.

Each department has specific guidelines for the evaluation of performance of NTT faculty. Departmental evaluation guidelines reflect the mission and needs of the department, college, and University, cover the primary areas of the NTT appointment and must be approved by the Dean and Provost.

STANDARD 2.C: EDUCATION RESOURCES

2.C.1 The institution provides programs, wherever offered and however delivered, with appropriate content and rigor that are consistent with its mission; culminate in achievement of clearly identified student learning outcomes; and lead to collegiate-level degrees or certificates with designators consistent with program content in recognized fields of study.

Consistent with Montana State University's mission, the institution employs systems for ensuring that programs have mission-appropriate content and rigor with clearly identified student learning outcomes. These systems include a substantive program review, procedural systems, external accreditation, and ongoing academic program assessment.

Professionally accredited programs are reviewed in external program-reviews provided by program-specific accrediting bodies. For example, all of MSU's engineering programs are ABET accredited, and a number of other programs have discipline specific accreditation. The Montana Office of the Commissioner of Higher Education also requires that all programs that are not accredited by such an external accreditor be reviewed every seven years by MSU. The program review process for all such programs requires that the program/department write a self-study report and invite external or internal (or a team including both internal and external) evaluators for a site visit. The evaluators produce a report in response to the self-study and visit. The Dean of the College then writes a response to the self-study and evaluator report. These documents are collected in the Provost's office and a summary report on all program reviews are presented to the BOR each Fall.

Program assessment involves establishing program learning outcomes and assessing student performance for each outcome. Program assessment is described in each academic program's Assessment Plan, which include outcomes, threshold values, curriculum maps, and assessment schedules. Departments develop and maintain program learning outcomes and records of academic program assessment on their websites. A list of these websites can be found under program expected learning outcomes on the Provost's academic assessment webpage. Programs also submit electronic academic program assessment reports for the prior academic year to the program assessment e-mail

address by September 15. For further discussion of academic program assessment, please see more detailed information on academic program assessment in Standard 4.A under Core Theme Learning. Montana State University also keeps a repository of course learning outcomes up to date on the Provost's website.

MSU uses a course inventory management (CIM) system for new and revised course and program approvals to ensure that the process is consistent. Curriculum development, which includes both new courses and programs, is initiated by faculty and departments/programs, with multiple levels of input and consideration by curriculum committees at the department and college levels, the appropriate Dean, the University Curriculum and Program Committee (CPC) or the University Graduate Council (UGC), Faculty Senate, Deans' Council, and the Provost, with final review by the Board of Regents or the Commissioner of Higher Education when acting as its designee. For example, the UGC reviews all new BOR Level II graduate program proposals to understand the programmatic need, alignment with the University's strategic plan, curriculum, resource needs, expected learning outcomes, data sources and assessment processes. The CPC operates in a similar manner reviewing undergraduate program proposals.

As outlined in the BOR Academic Affairs Procedural Guidebook, "Level I items are those requests for which the BOR has designated approval authority to the institution or the OCHE" and "Level II proposals require approval of the BOR." After all internal approvals have been obtained, Level I and Level II curricular changes are submitted to the Office of the Commissioner of Higher Education (OCHE) for OCHE and Montana BOR notification or approval and then to the NWCCU if required.

As mentioned above, MSU uses a course inventory management (CIM) system for new and revised course and program approvals. The system embeds all the required steps, and detailed instructional materials for using the system are available to all departments. Pursuant to Montana BOR Policy 303.10, Montana State University submits to the BOR an Academic Program Planning list, which is posted on the BOR Academic Program Planning site. The MSU academic program plan is to contain all programs that the campus may submit to the BOR for its consideration in the next three years. Departments may add ideas to this local MSU Academic Pre-Plan list at any time, and then items on the Pre-Plan list are considered for inclusion on the Academic Program Planning list, which is sent forward to the BOR each Spring.

2.C.2 The institution identifies and publishes expected course, program, and degree learning outcomes. Expected student learning outcomes for courses, wherever offered and however delivered, are provided in written form to enrolled students.

Faculty within academic departments and general education programs are responsible for developing, maintaining and reporting learning outcomes. A link to all degree and program learning outcomes, hosted on department websites, are included on the program assessment learning outcomes page hosted on the Academic Program Assessment webpage. Linked pages also provide information on student learning assessment, strategies for developing good program learning outcomes and optional templates for program assessment plans and reports. Course learning outcomes for existing courses were collected in 2012-13, and are now a required part of every new course proposal.

Course learning outcomes are published on the Provost's Course Assessment webpage and may be updated by faculty at any time using the Curriculum Inventory Management (CIM) software. The CIM system has the ability to capture student learning outcomes for all courses offered. The course assessment page provides information on developing course learning outcomes and a sample syllabi.

Information on developing course syllabi is also provided by the Center for Faculty Excellence on their syllabus language page. Course learning outcomes are a required component of every syllabus, and syllabi must be made available to students in either hard copy or electronically within the online learning platform. This is mandated in the Faculty Responsibilities section of the Faculty Handbook. This policy states, "Faculty are an integral part of the teaching mission of the university. In fulfillment of the teaching mission, the faculty shall create a course syllabus that states in writing the specific course content, objectives, and expected learning outcomes. The course syllabus will be made available to the students by the second class meeting or within a week of the start of the course for on-line courses."

2.C.3 **Credit and degrees, wherever offered and however delivered, are based on documented student achievement and awarded in a manner consistent with institutional policies that reflect generally accepted learning outcomes, norms, or equivalencies in higher education.**

Credits and degrees awarded are consistent with institutional policies, and reflect the careful review process and accepted learning outcomes and equivalences that are expected of an institution of higher education. Academic credit is awarded in the form of semester credit hours. The registrar's office uses a definition of credit hour that was developed by the Faculty Senate and approved by the Provost in 2013. The definition requires evidence of student achievement. In 2017, all departments were asked to review each course listed in the college catalog. While the review was prompted by an institutional effort to assess all prerequisites, it included a review of credit hours. For new courses, the Curriculum Inventory Management software links the review process to what is recorded in the student information system and includes guidance on proper credit assignment in regard to class or lab hours of instruction. Any variation of credit hour assignment in newly proposed courses or changes in the credit hour assigned for existing courses are submitted for review in the CIM. Learning outcome definitions and annual assessment for each program of instruction ensure that credit hour assignment is consistent and adheres to the definition provided in the university catalog.

General degree requirements for undergraduate programs and individual program requirements are outlined in the MSU Catalog. For each program, the catalog provides information that includes a curriculum map and minimum requirements for the option, as well as any other requirements impacting students seeking that degree. The Graduate School also lists the general graduate degree requirements under section 5 of the Index of Policies and Procedures on the graduate school website. The Graduate Catalog includes the degree requirements for all graduate programs.

MSU's degree audit utility, Degreeworks, is a web-based degree audit and tracking system that allows students and their academic advisors to track student progress toward their degree through a worksheet that clearly illustrates completed, in progress and yet to be completed courses in their degree program or programs. Each student's faculty or staff advisor, the departmental certifying office (generally the Department Head or Option Director), and the Office of the Registrar audit

and approve individual student records to ensure that all requirements are met. Students have access to their Degreeworks page and can track their own progress, estimate their GPA, see transfer and exception credits, and explore other majors and minor opportunities. Degreeworks also tracks advisor/student interactions and provides an electronic record of advising recommendations.

2.C.4 Degree programs, wherever offered and however delivered, demonstrate a coherent design with appropriate breadth, depth, sequencing of courses, and synthesis of learning. Admission and graduation requirements are clearly defined and widely published.

In addition to publishing course learning outcomes and defining program learning outcomes, the University has set standards to ensure coherent design with the breadth, depth, sequencing of courses and synthesis of learning for all programs. The design of each program originates within the academic schools and colleges, and new degree programs or changes to existing degree programs go through an extensive review process documented in 2.C.1

Students demonstrate a **depth** of understanding by completing their major or minor requirements. **Breadth** of learning is ensured by the Core 2.0 Curriculum (MSU's general education requirements). The Core 2.0 is a required part of each baccalaureate degree and is designed to enhance students' intellectual experience. This is achieved by exposing students to multiple and varied scholarship, enabling students to critically evaluate information in academic fields of study outside their major areas of study, and teaching them to present their own knowledge clearly in both verbal and written form. At the Graduate level a program of study is designed by the individual student and the student's graduate committee chair and committee members, which includes all required coursework and an appropriate balance of coursework and research. The aim is to provide students with the **depth** of understanding of their particular area of expertise, in addition to a **breadth** of understanding of the more general discipline.

Each baccalaureate degree requires a minimum of 120 semester credits, including 42 upper-division credits to ensure minimum depth (which are also tracked in Degreeworks for students to be able to see their progress toward meeting graduation requirements). Where the sequencing of courses is important, it is ensured through the establishment and enforcement of prerequisite coursework. **Synthesis of learning** at the undergraduate level is demonstrated through successful completion of required capstone or research/performance coursework in most degree areas and through senior seminars, internships, service-learning courses or professional exams within one's major. **Synthesis of learning** at the Master's and Doctoral level is demonstrated by the successful completion of comprehensive exams and the professional paper/thesis/dissertation.

General admission requirements as well as program-specific admission requirements are published in the university catalog, and comprehensive general admission information is also available on the Undergraduate Admissions and the Graduate School's Admissions page. Information regarding MSU's academic programs, and graduation requirements can be found in several locations. All undergraduate and graduate degree program requirements are published in the university catalog. The catalog and department websites are readily available online and all new students receive a hard copy catalog published the year in which they first matriculated to the university.

2.C.5 **Faculty, through well-defined structures and processes with clearly defined authority and responsibilities, exercise a major role in the design, approval, implementation, and revision of the curriculum, and have an active role in the selection of new faculty. Faculty with teaching responsibilities take collective responsibility for fostering and assessing student achievement of clearly identified learning outcomes.**

Curriculum Development

Proposals for new courses are typically prepared by the faculty members who plan to teach the course. As an exception, proposals for courses in the workforce development area are sometimes created before the faculty members are hired. In all cases the faculty member is expected to revise and update the course as needed as it is taught.

Proposals and development of new programs involve faculty members, and these efforts are often led by the department head. Program proposals are developed with consideration of strategic planning and university mission. The campus review process for new course proposals and new program proposals involves the review steps illustrated in "Proposing a New Course" and "Proposing a New Program". Within this process faculty are involved in the design and proposal of new courses and programs and comprise the majority of membership on the department curriculum committees, the college curriculum committees, the Curriculum and Programs Committee (the University-level curriculum committee) and the Faculty Senate. This review process was built into the workflow process of the Curriculum Inventory Management software introduced in 2014.

Curriculum Modification

In 2014, the Faculty Senate approved a set of guidelines for review of curriculum changes. Under these guidelines, the scope of a proposed curriculum change is determined and used to specify the level of review required.

Assessment of Learning Outcomes

Program learning outcomes are a required element of each program's assessment plan. Program learning outcomes, assessment plans, and program assessment reports are developed by faculty and are published on department websites. Links to these pages are on the Provost's Assessment Web page. Programs use the plans as the basis for reviewing and reporting on the extent to which students in their programs are performing relative to the program learning outcomes in the assessment plan.

Selection of New Faculty

It is standard practice to have faculty members from the hiring department or a closely related discipline on search committees for new faculty. The Recruitment and Hiring Handbook guides the faculty hiring process. Section c of the Rights and Responsibilities section of the 2017 Faculty Handbook outlines faculty service responsibilities, which include maintaining "an active and significant role in the selection of new faculty and members of administration."

2.C.6 Faculty with teaching responsibilities, in partnership with library and information resources personnel, ensure that the use of library and information resources is integrated into the learning process.

MSU policy on faculty teaching responsibilities indicates that faculty shall "[i]ntegrate the use of library and/or other information resources as appropriate into the learning process." This is also documented in the Faculty Handbook under "Teaching Responsibilities". The MSU Library supports this integration through its library liaison and instruction programs.

The Library's liaison program assigns a faculty librarian to one or more discipline-specific departments on campus. Under this model, librarian liaisons are expected to communicate regularly with departments to ensure that the library purchases and subscribes to information resources that are appropriate for its programs of study.

The Library's active instruction program also ensures that departments across campus are integrating information resources into the learning process by integrating library instruction into scheduled classes, either in existing classrooms or in the library's classrooms. During the 2015-2016 school year, integrated library instruction reached 7528 students, faculty, staff, and administrators, and was included in 89 separate university courses.

2.C.7 Credit for prior experiential learning, if granted, is: a) guided by approved policies and procedures; b) awarded only at the undergraduate level to enrolled students; c) limited to a maximum of 25% of the credits needed for a degree; d) awarded only for documented student achievement equivalent to expected learning achievement for courses within the institution's regular curricular offerings; and e) granted only upon the recommendation of appropriately qualified teaching faculty. Credit granted for prior experiential learning is so identified on students' transcripts and may not duplicate other credit awarded to the student in fulfillment of degree requirements. The institution makes no assurances regarding the number of credits to be awarded prior to the completion of the institution's review process.

MSU policies on prior learning assessment reside on the office of the registrar website and are consistent with the Montana Board of Regents PLA Policy and Procedures.

In 2014-15, a Prior Learning Assessment (PLA) Taskforce was established to recommend policy to the Montana Board of Regents to govern PLA across the Montana University System. The taskforce ultimately developed a set of policy recommendations for PLA from which Policy 301.19 was drafted. The Board of Regents adopted Policy 301.19 at the September 2015 meeting. The BOR policy stipulates awarding of credit in the manner defined in this standard.

This approved policy adheres to the NWCCU standards:
- Awarded only at the undergraduate level to enrolled students
- Limited to a maximum of 25% of the credits needed for a degree
- Awarded only for documented student achievement equivalent to expected learning
- Achievement for courses within the institution's regular curricular offerings
- Granted only upon the recommendation of appropriately qualified teaching faculty
- PLA credit award only applies to undergraduate students

2.C.8 The final judgment in accepting transfer credit is the responsibility of the receiving institution. Transfer credit is accepted according to procedures which provide adequate safeguards to ensure high academic quality, relevance to the students' programs, and integrity of the receiving institution's degrees. In accepting transfer credit, the receiving institution ensures that the credit accepted is appropriate for its programs and comparable in nature, content, academic quality, and level to credit it offers. Where patterns of student enrollment between institutions are identified, the institution develops articulation agreements between the institutions.

Transfer credit procedures designed to ensure high academic quality, relevance to the students' programs, and adherence to the high academic quality of Montana State University are delineated in the admissions section of the MSU catalog. The Office of Admissions or the Registrar's Office determine adherence to general academic standards, including: transfer university accreditation, passing grades, college level, upper division, and number of credits. Additionally, evaluation of applicability toward general education (Core 2.0) is assessed centrally by the Registrar's Office. Applicability of course content toward the student's degree or direct equivalency for a MSU course is determined at the academic departmental level.

The most significant pattern of student transfer is between schools within the Montana University System. The MUS has implemented a common course numbering (CCN) process through which all courses are vetted. Those courses with content and outcomes with 80% similarity are assigned common rubrics and numbers to facilitate transferability. Montana State University faculty actively participate in the CCN process to determine and accept, if appropriate, all of these courses as direct and equivalent transfer. The MUS CCN website provides details and is available to the public.

2.C.9 The General Education component of undergraduate programs (if offered) demonstrates an integrated course of study that helps students develop the breadth and depth of intellect to become more effective learners and to prepare them for a productive life of work, citizenship, and personal fulfillment. Baccalaureate degree programs and transfer associate degree programs include a recognizable core of general education that represents an integration of basic knowledge and methodology of the humanities and fine arts, mathematical and natural sciences, and social sciences. Applied undergraduate degree and certificate programs of thirty (30) semester credits or forty-five (45) quarter credits in length contain a recognizable core of related instruction or general education with identified outcomes in the areas of communication, computation, and human relations that align with and support program goals or intended outcomes.

Montana State University's general education program for undergraduate students is called Core 2.0 and was implemented in 2004. Students transferring to MSU with a degree (typically a transfer associate degree) from a regionally accredited institution are deemed to have completed a general education program and do not have to complete Core 2.0 requirements. All other students pursuing a baccalaureate or transfer associate degree at MSU are required to meet the requirements of Core 2.0.

As a land-grant university, MSU is charged, through the Morrill Act of 1862, with providing "liberal and practical education...in the several pursuits and professions of life." In addition, as a member of the Montana University System, MSU provides programs that "stimulate critical analysis, clear and effective communication, and the creative process." Students should also "broaden their cultural horizons by contact with the creative arts, sciences and the humanities, and achieve an understanding of the political, social, economic and ethical problems of the contemporary world and the relation of their studies to these problems."

To this end, the faculty of MSU have developed Core 2.0 for all undergraduate students in an effort to enable students to reach their intellectual potential, to become contributing members of society, and to compete more successfully in our rapidly changing and increasingly complex world.

The purpose of the Core 2.0 curriculum is to ensure a wide-ranging general education of consistent and high quality to all Montana State University students regardless of their major or area of study. Core courses allow students to reaffirm their common experiences, redefine their common goals, and confront their common problems. Core courses emphasize communication and techniques of creative inquiry in a variety of disciplines.

Core 2.0 curriculum at Montana State University is designed to enhance students' intellectual experience in all realms of academia, with the express goal of providing students with a broad exposure to and knowledge of multiple and varied methods of scholarship. The Core curriculum consists of required classes that focus on clear verbal and written expression(s) of critical analysis and evaluation of academic fields of study at the heart of human intellectual and artistic inquiry and achievement. Completion of the Core 2.0 curriculum requirements introduces students to the theories, methods, and foundations of these academic fields, enable them to critically evaluate information in these subjects, and teach them to present their knowledge clearly in both verbal and written form.

Core 2.0 requirements (27-30 in credits) are built on five Foundation courses (University Seminar, College Writing, Quantitative Reasoning, Diversity, and Contemporary Issues in Science), and on Inquiry and Research & Creative Experience courses in Arts, Humanities, Natural Sciences and Social Sciences.

Core 2.0 is required for all baccalaureate degrees and for the Associate of Arts and Associate of Science degrees. Also, all 30 credit certificates at Gallatin College contain a recognizable core general education with identified outcomes in the areas of communication (writing), computation (mathematics), and human relations (professional communications) that align with and support program goals or intended outcomes.

The Montana University System Core (MUS Core), described in Policy 301.10 and the Operational Rules for the Montana University System Core, represents a transfer agreement among community, tribal, and publicly-funded colleges and universities in the State of Montana. It assures that if the student has completed the entire 30-credit MUS core, following the operating rules approved by the Montana board of regents, and transfers to another unit in the MUS that student cannot be required to take additional general education courses at the lower division level.

2.C.10 **The institution demonstrates that the General Education components of its baccalaureate degree programs (if offered) and transfer associate degree programs (if offered) have identifiable and assessable learning outcomes that are stated in relation to the institution's mission and learning outcomes for those programs.**

Learning outcomes for Core 2.0 have been updated to make the outcomes more assessable and consistent with the MSU mission and values. The Core 2.0 curriculum committee provides faculty leadership for the core curriculum as a whole and a forum for discussion of issues that impact all elements of the core. Each of the five Foundation Cores (University Seminar, College Writing, Quantitative Reasoning, Diversity, and Contemporary Issues in Science) and the Inquirity and Research & Creative Experience Cores have faculty led steering committees who are charged with supporting that particular Core area and evaluating new Core 2.0 course proposals to determine which courses should be approved for inclusion in the core based on content and learning outcomes. The steering committees also clarify goals and recommend policies to address concerns that may arise in their courses, manage the assessment of all Core courses in their areas and make recommendations to the Core 2.0 Curriculum Committee.

The Gallatin College A.A. and A.S. require that students complete Core 2.0.

2.C.11 **The related instruction components of applied degree and certificate programs (if offered) have identifiable and assessable learning outcomes that align with and support program goals or intended outcomes. Related instruction components may be embedded within program curricula or taught in blocks of specialized instruction, but each approach must have clearly identified content and be taught or monitored by teaching faculty who are appropriately qualified in those areas.**

Each workforce program that Gallatin College develops and offers or develops is based on industry input and labor market data research that guide development of program goals and intended student learning outcomes. Each program has clearly identified content and is taught by teaching faculty who are appropriately qualified in those areas. The content of workforce programs are identified by industry needs, and industry advisors provide feedback on curriculum and equipment that should be included in the labs. Each program has clearly defined learning outcomes, which are assessed by both internal (and in some cases) external accrediting bodies.

Just like MSU four-year programs, program outcomes for all two-year Applied Associate of Science (AAS) degrees and one-year Certificates of Applied Science (CAS) are assessed each year. The Program Directors for each program follow an established Assessment Plan that outlines which outcomes are reviewed each year and in what course(s) each outcome is met. At the start of the academic year, these outcomes are reviewed with the Associate Dean and Program Director, and the courses and assessments (homework, projects, exams, etc.) are identified to determine what will be reviewed to assess the program outcomes. Program Directors then lead the assessments throughout the year – tracking progress with appropriate non-tenure track faculty and collecting data from each assessment. At the end of the academic year a brief summary is written to report how each assessment measures student achievement (as introduction, developing or mastering of course content). This summary is reviewed by the Associate Dean and Program Director to determine if any changes need to be made for the following academic year, including but not limited to, reviewing program outcomes with their industry advisory board, rewriting a program outcome, or adjusting an assessment. These actions are built into the tenure or tenure-track faculty member's annual goals for the following year and the process is repeated for the next set of outcomes in the Assessment Plan.

NOTE: Gallatin College operates under a [Two-Year Comprehensive Mission Expansion Plan](#), approved by the Board of Regents in March 2013. In this plan, initiatives for enrollment and program growth have been established, along with matrices for these initiatives, which correspond to the strategic plan.

2.C.12 **Graduate programs are consistent with the institution's mission; are in keeping with the expectations of their respective disciplines and professions; and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. They differ from undergraduate programs by requiring greater depth of study and increased demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or appropriate high-level professional practice.**

Consistent with MSU's mission to educate students, create knowledge and art, and serve the communities by integrating learning, discovery and engagement, MSU graduate programs provide degree and certificate opportunities in areas such as engineering, science, mathematics, arts, humanities, and health fields that meet the changing needs of today's society.

Application of the 500-600 course numbers reflect levels of instruction that must provide far more depth and intellectual challenge than the undergraduate components. University Graduate Council relies on the expertise of external reviewers, professional societies, specialized accreditation commissions, and national rankings for indicators of the academic rigor, quality and standards of individual units, degrees and programs. Each proposed new graduate degree or emphasis option is required to undergo a rigorous multi-level approval process coordinated by the University Graduate Council through The Graduate School. Graduate degrees require independent research or creative activity reflective of the discipline's professional standards, demonstrated through appropriate coursework, written thesis, or creative output.

2.C.13 **Graduate admission and retention policies ensure that student qualifications and expectations are compatible with the institution's mission and the program's requirements. Transfer of credit is evaluated according to clearly defined policies by faculty with a major commitment to graduate education or by a representative body of faculty responsible for the degree program at the receiving institution.**

The Graduate Council supports departments and academic units to preserve and enhance the highest standards of quality and excellence in their individual discipline, and The Graduate School ensures that appropriate minimal graduate admissions criteria are in place. These minimal graduate admissions criteria are published on the Graduate School webpage.

In addition to the minimum requirements, each department or academic unit may require additional (or more rigorous) admissions materials. These additional requirements are approved and enforced through the regulatory power of The Graduate School. Information on specific graduate programs and their requirements can be found in the Graduate School section of MSU's catalog.

The Graduate School's Policies and Procedures assist graduate students from admission to completion of their graduate degrees and certificates (including transfer of credits and minimal credit requirements). The Graduate School, in conjunction with the University Graduate Council, reviews, modifies, and approves graduate academic policies.

Transfer credit evaluation is conducted in the academic department by faculty teaching in the graduate program.

2.C.14 **Graduate credit may be granted for internships, field experiences, and clinical practices that are an integral part of the graduate degree program. Credit toward graduate degrees may not be granted for experiential learning that occurred prior to matriculation into the graduate degree program. Unless the institution structures the graduate learning experience, monitors that learning, and assesses learning achievements, graduate credit is not granted for learning experiences external to the students' formal graduate programs.**

Specific professional preparation programs within the University do grant credit for internships and practicums that are designed and monitored by the offering department. No graduate credit is granted for experiential learning external to degree programs. Graduate credit can be given for internships and field experiences as long as they are within the discipline and supported by the department. Information on degree requirements for these Special Courses can be found on The Graduate School webpage. The number of credits from an internship or field (independent) study that can be applied to a program of study is limited by policy to no more than one-third of the minimum required credits for that degree program.

2.C.15 **Graduate programs intended to prepare students for research, professional practice, scholarship, or artistic creation are characterized by a high level of expertise, originality, and critical analysis. Programs intended to prepare students for artistic creation are directed toward developing personal expressions of original concepts, interpretations, imagination, thoughts, or feelings. Graduate programs intended to prepare students for research or scholarship are directed toward advancing the frontiers of knowledge by constructing and/or revising theories and creating or applying knowledge. Graduate programs intended to prepare students for professional practice are directed toward developing high levels of knowledge and performance skills directly related to effective practice within the profession.**

All graduate programs and certificates undergo a rigorous process for review and approval. Programs originating from the academic department are reviewed by their appropriate College, University Graduate Council, Curriculum & Programs Committee, Faculty Senate, Deans Council, Provost, Board of Regents, and the Commission.

Faculty members in these graduate programs ensure that programs have a coherent design and that they are at least commensurate with practices at peer institutions. Furthermore, learning outcome assessments are consistent with the highest academic standards. Programs intended to prepare students for professional practice normally require a capstone project, professional paper and/or exit exam intended to demonstrate knowledge and skills directly associated with effective practice in the profession. Artistic and creative programs generally require an exit show, performance, or other creative expression that demonstrates original concepts, interpretations, imagination, thoughts or feelings. Research and scholarship programs require an independent thesis project incorporating original research.

2.C.16 Credit and non-credit continuing education programs and other special programs are compatible with the institution's mission and goals.

Non-credit continuing education courses and programs are offered through MSU Extended University (EU) and are compatible with the institution's mission and goals, particularly those related to Core Themes Learning and Engagement. MSU's EU programs offer a variety of non-credit offerings for adults and youth. EU focuses on workforce development, professional development for teachers, and summer youth programs, as well as niche courses for personal enrichment.

EU invites experts in their field to submit proposals for new non-credit seminars, workshops, youth programs, short courses, certificate programs, and institutes. Program proposals are reviewed by a committee consisting of the Executive Director for Extended University, Assistant Director of Continuing Education, and the Assistant Director for Outreach.

2.C.17 The institution maintains direct and sole responsibility for the academic quality of all aspects of its continuing education and special learning programs and courses. Continuing education and/or special learning activities, programs, or courses offered for academic credit are approved by the appropriate institutional body, monitored through established procedures with clearly defined roles and responsibilities, and assessed with regard to student achievement. Faculty representing the disciplines and fields of work are appropriately involved in the planning and evaluation of the institution's continuing education and special learning activities.

Extended University is a Montana State University academic outreach department that supports MSU's land-grant mission by reaching beyond the traditional campus, classrooms, and academic programs to create unique learning environments and provide educational opportunities for individuals to meet their academic, professional, and lifelong learning goals throughout the state of Montana and beyond.

Extended University collaborates with colleges, departments, and faculty to assure that there is appropriate academic content, academic oversight, learning objectives, and assessment with regard to student achievement. Some programs are developed in partnership with professional associations or community groups. These programs support Core Theme of engagement. Planning committees include representation from current or former faculty as well as Extended University administrators.

Non-credit and Continuing Education courses adhere to Montana Board of Regents Policy 304.2 related to the offering of non-credit continuing education. Continuing education courses and programs which are offered for academic credit, are the responsibility of the individual colleges and are monitored through established college and departmental procedures.

2.C.18 The granting of credit or Continuing Education Units (CEUs) for continuing education courses and special learning activities is: a) guided by generally accepted norms; b) based on institutional mission and policy; c) consistent across the institution, wherever offered and however delivered; d) appropriate to the objectives of the course; and e) determined by student achievement of identified learning outcomes.

Extended University (EU) is guided in offering continuing education units by MSU mission, policy, and strategic plan and is committed to delivering public service, continuing education and outreach to the people of Montana and beyond. EU reports to the Executive Vice President for Academic Affairs and Provost.

Some EU courses award Continuing Education Units (CEUs), which are recorded on an MSU transcript. MSU adheres to the International Association of Continuing Education and Training (formerly the Council on the Continuing Education Unit) defining the CEU as "ten contact hours of participation in an organized continuing education experience under responsible sponsorship, capable direction and qualified instruction." Course requests for CEUs are reviewed and approved by Extended University in collaboration with academic units. MSU faculty are often involved in the development and delivery of continuing education and outreach programs.

[Procedures for CEU request and review](#) are publically available on the MSU Extended University website.

Any continuing education or special learning activities granting academic credit follow all college, department, and institutional procedures in the same manner as any other academic course. Non-credit courses adhere to all Montana Board of Regents policies related to the offering of non-credit continuing education.

2.C.19 The institution maintains records which describe the number of courses and nature of learning provided through non-credit instruction.

MSU Extended University is responsible for maintaining records on all non-credit activity offered through Extended University. Records include course syllabus, instructor vitae (if non-MSU faculty), MSU continuing education course approval, student enrollment, and student completion. Courses that are approved for Continuing Education Units are recorded on an MSU transcript by the Office of the Registrar.

STANDARD 2.D: STUDENT SUPPORT RESOURCES

2.D.1 Consistent with the nature of its educational programs and methods of delivery, the institution creates effective learning environments with appropriate programs and services to support student learning needs.

With a commitment to MSU's mission, the university offers a variety of programs, environments, services, and offices to assist meeting the individual needs of students across all educational programs and methods of educational delivery.

Physical learning environments are regularly assessed and improved following the prioritization of the Classroom Committee. The online learning environment administered through a single learning management system is reviewed annually by the Online Learning Advisory Committee (OLAC). Members (mostly faculty) are appointed by the Provost and Chief Information Officer (CIO).

MSU maintains a health and physical education complex with recreational sports and fitness programs that support student physical well-being.

Academic support may be found in individual academic departments and in several university-wide service units. The Academic Advising Center, and the Allen Yarnell Center for Student Success provide individual academic, career, financial, and student success advising. The Library, in partnership with University Information Technology, provides support for student academic and scholarship success through the Library Commons, the University Information Technology (UIT) Service Desk, Research Center, and the Innovative Learning Studio (ILS). Additional support for academic programs is offered by SmartyCats Tutoring, the Writing Center, and the Math Learning Center. The Office of International Programs (OIP) offers assistance with orientation, advising, immigration questions, and applicable forms for students traveling abroad and students from other countries studying at MSU.

Developmental math and writing needs are met through the developmental education courses provided by Galatin College in compliance with MUS policy 301.18 through various delivery models including co-requisites, accelerated, self-paced, pathways courses taught by tenured and tenure-track faculty with developmental expertise.

Co- and extra-curricular programs that support students in a holistic manner have been developed over time within and across Academic Affairs, Student Success, and Auxiliary Services. MSU continues to fund and assess ongoing programs that have provided historical support for students, including programs that nurture students' physical and mental health; programs that support veterans, disabled students, LGBTQ students, under-represented race and ethnicity groups, returning students, and women; and student-led organizations. MSU also participates in TRiO, Student Support Services and McNair Scholars.

In the last five years, new programs and services have been proposed after careful review of student needs and/or demands, with funding provided contingent on the development of an assessment plan. New programs and services to support students have generally been reviewed after one to three

years before providing base funding to the efforts. In some cases, assessment indicates appropriate sunsetting of the program or service.

Units that have developed new or expanded student support programs or services under this proposal-investment-assessment cycle include the Allen Yarnell Center for Student Success, SmartyCats Tutoring, the Writing Center, the Math Learning Center, the Office of Financial Education and Counseling & Psychological Services.

2.D.2 **The institution makes adequate provision for the safety and security of its students and their property at all locations where it offers programs and services. Crime statistics, campus security policies, and other disclosures required under federal and state regulations are made available in accordance with those regulations.**

The MSU Police Department, in partnership with the campus community and within the framework of the university's mission, is dedicated to creating and promoting a safe, secure, and peaceful environment by effectively applying policies and laws, delivering emergency services, performing requests for assistance, and providing on-going public safety education.

MSU has 20 full-time sworn officers, 6 part-time officers, and 8 student security officers. The university police officers have complete law enforcement authority to arrest individuals involved in illegal acts both on campus and within the city limits of Bozeman.

If minor offenses involving university rules and regulations are committed by a university student in violation of the Code of Student Conduct, university police officers may also refer the individual to the Office of the Dean of Students. The University Police Department works very closely with the Office of the Dean of Students and the Department of Residence Life in responding to conduct issues.

MSU Police Services offers an emergency messaging system to faculty, staff, and students. MSU Alert is the notification system that delivers critical information in the event of an emergency. The program sends a text and/or email message to all enrolled cell phones and email accounts when an emergency occurs. In the event that a situation arises on or off campus that, in the judgment of the Chief or Captain of University Police Department, constitutes an ongoing or continuing threat to the campus population, a campus wide "timely warning" will be issued. Depending on the particular circumstances of the crime or emergency, especially in all situations that could pose an immediate threat to the community and individuals, University Police may notify the campus community through an "immediate notification" by a variety of means, including, but not limited to:

- Mass email message, voice mail, text message, local news media, and university page emergency alerts
- Printed notices, when appropriate, posted at campus locations affected by the emergency
- Crime alerts for issues that remain an ongoing concern to the campus community, posted on the Montana State University Police Department website.

The MSU Police Department provides free on campus safety escorts to its community; accompanying individuals from one campus location to another, at their request. Police officers and student security provide this service. In the 2015-2016 academic year, 312 escorts were given.

The MSU Police Department is also responsible for statistics and reports required under the Clery Act and are reported by University Police in accordance with the U.S. Department of Higher Education standards. Additional information, including contact telephone numbers and hours of operation, are also provided in the Montana State University Annual Security and Fire Safety Report.

The Office of Institutional Equity coordinates MSU's civil rights compliance. The Office supports faculty, staff, students, and visitors through timely response to reports of harassment and discrimination, education across campus, and coordinating a network of services that address sexual assault, dating and domestic violence, and harassment.

The Office of Safety & Risk Management and Office of Research Compliance monitor laboratory operations across campus, in both undergraduate teaching laboratories and research laboratories. The goal is to assist departments in following the University's Environment, Safety & Health policy that drives "maintaining a campus environment for students, faculty, staff, volunteers, and visitors that will not adversely affect their health, safety and surrounding environment, or subject them to risks of accidental injury or illness."

2.D.3 Consistent with its mission, core themes, and characteristics, the institution recruits and admits students with the potential to benefit from its educational offerings. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advising about relevant academic requirements, including graduation and transfer policies.

MSU admissions policies are governed by the Board of Regents policy 301. MSU, in keeping with its mission and admission policy, recruits and admits students who demonstrate potential for success. Admissions, new student orientation, and ongoing student support staff pay significant attention to ensuring that students benefit from MSU's educational offerings through policy and programming that meet student needs

MSU admission determinations are made without regard to ethnicity, socioeconomic status, or religion. However, student services provide various supportive programs and services for a wide variety of students with diverse backgrounds and needs, as described in 2.D.1.

The Office of Admissions provides new student orientation and registration programs for all new students at the undergraduate level. These programs focus on helping new students acclimate to MSU, learn MSU policies and procedures, as well as engage with the multiple advising options and peer support programs.

New freshmen entering in the fall attend one of several 2 ½-day summer orientation programs while new transfer students can make an advising appointment during the summer to complete the registration process or attend an organized orientation program prior to the term they intend to

enter MSU. These programs are mandatory and in all cases include meetings with academic advisors. Students receive notification about, and registration forms for, orientation in the mail once they have been admitted to MSU. Academic information and presentations on navigating the MSU system; retention, rights, and responsibilities; safety and security; and student extracurricular involvement are offered to new students during orientation programs prior to each term. The non-traditional students of Gallatin College attend program-specific orientations to better meet the needs of two-year students.

Graduate orientation programs are also provided by the Graduate School.

Additional orientation opportunities are provided for veterans, American Indians, and international students. These orientations precede and align with the general new student orientation.

Throughout their education, undergraduates are encouraged to meet regularly with their assigned advisor. Students may access their advisor through the online tool DegreeWorks, where they can find their advisors' name and email link. Finally, students who demonstrate academic distress in their first term are invited to a "reboot" orientation called MSU 101 prior to the start of the second semester, which provides additional information on success strategies and support services offered at MSU.

2.D.4 In the event of program elimination or significant change in requirements, the institution makes appropriate arrangements to ensure that students enrolled in the program have an opportunity to complete their program in a timely manner with a minimum of disruption.

Program moratorium and withdrawal are governed by BOR policy 303.4 and require completion of a program termination/moratorium form. This typically requires a "teach-out" period to allow enrolled students time to complete their degrees. This is enforced using a required Program Termination Checklist provided by the Office of the Commissioner of Higher Education.

In the case of programs that are undergoing significant changes, faculty (in consultation with their Department Head/Chair) are able to assess and apply course exceptions that facilitate the progress of students, while maintaining the integrity of the academic program.

Undergraduates may elect to follow the catalog in effect when they first enroll at MSU, or any subsequent catalog, if there has not been a break of more than one academic year in their attendance and if they fall within the six-year catalog limitation policy. Undergraduate students transferring from any regionally accredited United States college or university may follow the MSU catalog which was in effect when they first entered the institution from which they transferred, or any subsequent catalog in effect prior to graduation, provided there has been no break in attendance. The six-year catalog limitation policy also applies to transfer students.

2.D.5 **The institution publishes in a catalog, or provides in a manner reasonably available to students and other stakeholders, current and accurate information that includes:**

   a) Institutional mission and core themes;

   b) Entrance requirements and procedures;

   c) Grading policy;

   d) Names, titles, degrees held, and conferring institutions for administrators and full-time faculty;

   e) Rules, regulations for conduct, rights, and responsibilities;

   f) Tuition, fees, and other program costs;

   g) Refund policies and procedures for students who withdraw from enrollment;

   h) Opportunities and requirements for financial aid; and

   i) Academic calendar.

The MSU Course Catalog and other clearly accessible webpages provide accurate and timely information regarding the policies and procedures regarding the following:

   a) Institutional mission and core themes

   b) Entrance requirements and procedures
      Undergraduate
      Graduate:

   c) Grading policy

   d) Names, titles, degrees held, and conferring institutions for administrators and
      full-time faculty:
      Faculty
      Administrators
      All employees of MSU may be found on MSU's database

   e) Rules, regulations for conduct, rights, and responsibilities

   f) Tuition, fees, and other program costs

   g) Refund policies and procedures for students who withdraw from enrollment -

   h) Opportunities and requirements for financial aid -

   i) Academic calendar -

2.D.6 **Publications describing educational programs include accurate information on: a) national and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered; b) descriptions of unique requirements for employment and advancement in the occupation or profession.**

There is no one publication that provides comprehensive information on legal eligibility requirements for licensure for all programs. Instead, Colleges provide specific information to their students about how their program meets the national and/or state legal eligibility requirements for licensure, or entry into an occupation or profession for which the education and training are offered. For example, the Department of Education offers information on Licensure, Field Placement and academic programing for both undergraduate and graduate programs. Other colleges include student resource information on careers for students in their specific fields, such as the College of Nursing.

A complete list of programs that have earned external accreditation can be found on MSU's accreditation website.

2.D.7 The institution adopts and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form. The institution publishes and follows established policies for confidentiality and release of student records.

Montana State University is governed by Montana State law, which upholds and protects a university student's right to privacy.

Electronic student records data are created in the MSU Enterprise Information System, and all student-related records are retained in the database, not purged. Backups of the database to the file system occur daily. Further backups of the centrally managed file systems span an eight-week onsite retention window consisting of nightly differentials, weekly full backups, and fiscal year end backups kept for three years. Fiscal year end backups, as well as weekly full backups of student record data, are taken offsite via physical media tapes.

According to the Data Stewardship Policy, the appointed data steward or delegate for student records is responsible for approving all requested access to student records (for any reporting purpose, or third-party system use of the data). Requests are requested, processed, and approved through a ticketing system.

Montana State University follows policies for confidentiality and release of student records as published on the MSU FERPA website and is governed by Montana State law, which additionally upholds and protects a university student's right to privacy.

MSU complies with the Montana University System policies for record retention.

2.D.8 The institution provides an effective and accountable program of financial aid consistent with its mission, student needs, and institutional resources. Information regarding the categories of financial assistance (such as scholarships, grants, and loans) is published and made available to prospective and enrolled students.

Consistent with MSU's Core Theme Access, the Office of Financial Aid Services assists students in financing their educational expenses through a variety of federal, state, and institutional loan, grant, scholarship, tuition waiver, and work programs. MSU participates in the federal student aid programs as authorized by Congress, programs through the Health Resources and Services Administration (HRSA), as well as numerous State of Montana aid programs. The MSU Financial Aid mission statement is available online. MSU offers one-time and renewable institutional recruitment scholarships and tuition waivers to entering freshmen, and offers scholarships to undergraduate students at all class levels through Financial Aid Services and Colleges and Departments. Tuition waivers are also awarded to graduate and international students.

By participating in these need-based and merit-based aid programs, MSU is able to encourage students to pursue and continue their education or to return as adult learners by removing financial barriers. Financial Aid Services plays a critical role in meeting MSU's recruitment, retention, and graduation rate goals. Approximately 65% of the student body receives some form of financial assistance each year and many would not be able to attend or persist without the benefit of aid.

Extensive aid information including the categories of financial assistance is available to students and the public on the university website. An Information Guide is provided to students each year with their aid award notifications. This thorough guide contains information on the various financial aid programs offered, aid requirements, important policies and procedures, and student rights and responsibilities. Students must attest that they have read and understand the contents of this guide before accepting their aid offers. Financial aid information is included in the MSU Viewbook and Admissions Application for prospective students. The Financial Aid Information Guide provides helpful information and links.

Montana's Legislative Audit Division conducts financial, financial-related (compliance), and information systems audits on a yearly rotating basis. MSU is subject to periodic comprehensive federal program reviews by the U.S. Department of Education. MSU's Financial Aid Services continuously evaluate compliance with federal, state, and institutional rules and regulations relative to the awarding of financial assistance programs, and implements or revises policies and procedures as necessary.

2.D.9 Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and the institution's loan default rate.

The Office of Financial Aid assists students in understanding their repayment obligations. This office also monitors student loan programs and loan default rates on a regular basis. At MSU, students are required to go through loan entrance counseling before receiving their first loan. A hold is placed on the loan disbursement until the student completes this counseling requirement. Electronic loan entrance counseling is provided through Federal Student Aid's website. Students are notified of this requirement in the Information Guide that accompanies their award notification, in their MyInfo accounts, and on the MSU website. A notice is also sent by email.

Students are required to participate in loan exit counseling when they leave school. MSU utilizes the National Student Loan Data System and also offers personal counseling sessions through the Office of Financial Education. Students are informed of this requirement by email and on the MSU website. Both entrance and exit counseling informs students of their rights and responsibilities as a borrower.

The Office of Financial Aid takes considerable care in monitoring compliance, student loan programs, and the institutional default rate. MSU takes pride in its low default rate. MSU's FY13 official three-year cohort default rate is 6.2%. This rate is much lower than the national default rate of 11.3%. Historically, MSU has had the lowest default rate in the Montana University System. The State's effective centralized default prevention program, MSU Financial Aid's advising efforts, educational materials and outreach, and the activities of MSU's Office of Financial Education in the Office of Student Success contribute to the low default rate.

MSU also monitors student debt burdens through the efforts of the Office of Financial Education. In addition to meeting with over 800 students during 2014-15, the office also sent more than 2000 "Know-Your-Debt-Letters" to students who had higher than desired debt thresholds. Research

conducted by MSU economics faculty revealed that students receiving the letters subsequently took on an average of$1,300 less debt the following semester. Student letter recipients were also more likely to register for more than 15 credits and pass more of their classes.

2.D.10 The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program requirements, and graduation requirements and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities are defined, published, and made available to students.

Montana State University provides coordinated academic advising to all undergraduate students starting at Orientation sessions, and continuing with required advising meetings at least once a semester (for registration advising) until graduation. At Orientation, students are provided with specific academic pathways for their declared majors, based on their math placement in relation to the required math in their major, as well as taking into consideration any AP/IB or dual enrollment credits the students have earned. Each semester, students must meet with an academic advisor to review their progress toward their major and receive their registration PIN number.

MSU has an Academic Advising Center staffed with professional advisors that serve a variety of student populations, including: undeclared/exploring students, students changing majors, first-year general Pre-Med and Pre-Vet majors, engineering majors whose math is below the required math level, and Pre-Law students, who receive advising from their initial interest to Law School application and acceptance. In addition, this center serves as the general "advising help center" for all students on campus. The director of the center also chairs a campus-wide Academic Advising Council, is responsible for offering training to professional and faculty advisors throughout the year, and disseminates advising information across an established communication network for both the academic and student services areas of campus, with strong emphasis on Orientation advising.

MSU has a shared advising structure with both professional advisors and faculty providing academic advising to students, depending on the college and department. In addition to the Academic Advising Center, there are six advising centers housed in colleges/departments staffed by professional advisors who provide transactional advising for majors. Some of these focus on entering and lower-division students, then transition students to faculty advisors as they need more major-specific advising and mentoring. Other colleges/departments connect students with faculty advisors as freshmen, with support from staff as needed.

Faculty advising is part of the faculty teaching responsibilities, consistent with the Role and Scope documents and the Faculty Handbook. Advising training for faculty is available through the University Advising Center, Center for Faculty Excellence programming, as well as Colleges that employ professional advising staff.

Policies, procedures, curricular and course information are defined, published, and made available to students through the following options:

- Course catalog – paper and online, updated yearly (Registrar's Office)
- Schedule of Classes – online, public information, representing real-time seat availability in all courses
- Course lists – paper and electronic lists representing specific focus areas for registration periods, such as "Core Courses by Category" or Liberal Studies major courses by option
- Registration Handbook – published prior to registration for each upcoming semester – paper and online versions (Registrar's Office)
- College & Departmental information – paper and online, updated regularly as needed for semester and Orientation advising, including departmental flowsheets, course information, and information specific to departments (such as application procedures for upper-division acceptance in Business or Nursing, or portfolio submission and review in Art and Film). Webpages are actively maintained to meet the demand for quick access to information.

The institution actively maintains technical systems to support advising (DegreeWorks) and registration (CatCourse, MSU's course scheduler), and proactively provides training to advising personnel across campus. Web and Digital Communication Services provide service for an on-line appointment scheduler and an automatic listserv that allows advisors to connect with their assigned students easily.

Assessment of advising services is done both at the departmental/college level and for the institution. Among assessment tools, the Office of Planning and Analysis conducts a regular student survey that includes questions on advising delivery and satisfaction. Results are shared with advisors and various administrative committees, with the intent of continual improvement.

2.D.11 Co-curricular activities are consistent with the institution's mission, core themes, programs, and services and are governed appropriately.

Co-curricular activities represent Montana State University's deep commitment to fostering a signature student experience and are representative of the institution's mission, core themes, programs and services. As discussed in detail in 2.A.17, MSU has more than 250 student clubs currently registered through the Office of Student Engagement (OSE), which represent a broad range of interests and subjects. OSE supports important core themes, such as student engagement opportunities, through programs, events, services and activities. OSE connects students to student government, student organizations, programs and events and encourages service to the community, all which support MSU's mission. All services provided are governed appropriately, for example each club is advised by a faculty or staff member.

MSU also offers fraternity and sorority life on campus. The fraternity and sorority experience offers students a unique opportunity to have a balanced college life with a focus on leadership, scholarship, service, and friendship. The Office of the Dean of Students serves the fraternities and sororities in an advisory capacity.

Several offices are charged with creating co-curricular experiences for students. The Allen Yarnell Center for Student Success (AYCSS) hosts multiple programs that support student engagement and student success, for example the Hilleman Scholars Program and Adventures MSU.

Co-curricular engagement is incentivized, supported, and measured through the use of the ChampChange program, through which all undergraduate students are able to earn points for engaging in campus activities. During AY 16-17 more than 592,404 student engagements were recorded on campus (a 16.4% increase from the year prior). The student success program (AYCSS) works with the office of the Vice President for Student Success to assess correlations between student co-curricular engagement and key success outcomes such as year-to-year retention and graduation.

2.D.12 If the institution operates auxiliary services (such as student housing, food service, and bookstore), they support the institution's mission, contribute to the intellectual climate of the campus community, and enhance the quality of the learning environment. Students, faculty, staff, and administrators have opportunities for input regarding these services.

Auxiliary Services operates Housing (Residence Life and Family and Graduate Housing), Culinary Services (Dining Halls, Retail, Concessions, and Catering), and Event Services (Strand Union Building and Sports Facilities), and has some oversight authority for the faculty and student owned University Book Store. These operations support the institution's mission and core themes, specifically enhancing Core Themes Learning and Engagement. Students, faculty, staff, and administrators have formal and informal opportunities for input regarding these services through advisory committees, customer satisfaction studies, comment boxes, and purchasing decisions. The Associate Vice President for Auxiliary Services reports to the Vice President for Administration and Finance, who supervises the unit's adherence to the mission and strategic plan.

Housing contributes to the intellectual climate of the campus community and enhances the quality of the learning environment with a variety of living options, which are overseen by Resident Directors, Assistant Resident Directors, Front Desk staff members, and Resident Advisors (RAs) or Community Advisors in family and graduate settings. RAs and Community Advisors program weekly activities to engage occupants into their given community and promote campus services to help them succeed.

The Living Learning Communities promote academic and personal growth by creating positive living and learning communities. In the South Hedges residence hall, "The Den" is a Student Success Center designed to bring services to students within their living environment, including tutoring, career & financial coaching, and success advising. The Allen Yarnell Center for Student Success, Counseling and Psychological Services, and Academic Affairs provide office hours within the facility. ResNet Computer Help Desk was moved to a more prominent location on the main floor of North Hedges. The ResNet Help Desk provides computer repair, troubleshooting and resolves connectivity issues for students within the housing system.

The Strand Union Building (SUB) serves as the student and visitor hub of the university, with meeting rooms, dining venues, entertainment, and accessible and inclusive facilities. ASMSU, the Office of Student Engagement, the Voice Center, the Women's Center, Veterans and Disability Services, the Ask Us desk, the Allen Yarnell Center for Student Success, Financial Aid, the MSU Bookstore, and the Office of the Dean of Students are all centrally located in the SUB.

The MSU Bookstore, located in the SUB, is a resource providing a comprehensive and diverse offering of goods, services, information, and advice to the University Community. These resources directly and indirectly support and enhance academic course work and life on campus. The MSU Bookstore offers textbook rentals, used textbooks, new textbooks, Ebooks, and buyback. The bookstore also offers a wide selections of books, computers, office and art supplies, gift items, Bobcat gear, and convenience items.

Culinary Services includes three residential dining halls, retail operations in the Strand Union Building and the Renne Library, MSU Catering, Cat Concessions, and Indulge, an on campus bakery serving the needs of the Culinary Services operations. For fiscal year ending June 2016, 1.6 million meals were served out of the dining hall operations. To serve special dietary needs of patrons, an on-staff Dietitian advises and develops special menus as needed and cooking staff prepares the meals for service. A new dining hall is scheduled to open in the Fall of 2018.

2.D.13 **Intercollegiate athletic and other co-curricular programs (if offered) and related financial operations are consistent with the institution's mission and conducted with appropriate institutional oversight. Admission requirements and procedures, academic standards, degree requirements, and financial aid awards for students participating in co-curricular programs are consistent with those for other students.**

The mission of the Montana State University Intercollegiate Athletics Department is closely aligned with the institutional mission and conducted with appropriate institutional oversight, as determined in the recertification process by the National Collegiate Athletic Association (NCAA) in the spring of 2011 through the self-study instrument.

The athletic administration, athletics academics and compliance personnel, and all coaches frequently review the NCAA and Big Sky Conference rules and policies. The Intercollegiate Athletics Department follows all university admission standards and expectations for all students at the University. Coaches must pass the NCAA coaches certification exam annually to recruit for the university. The test is administered annually by the Faculty Athletics Representative (FAR), who is appointed by the President. Student-athletes are held to the same admission, academic standards, and degree requirements as all other students at MSU.

The Intercollegiate Athletics Department and all of its personnel are accountable for following all university policies and standards relative to academic progress and student well-being. The Registrar's Office verifies initial and continuing eligibility for all student-athletes consistent with NCAA legislation. In addition, the Office of Financial Aid oversees all awarding and distribution of financial aid, as is the case with the general student body. The federal graduation rate for student-athletes is consistently and significantly higher than that of the general student body, 70% compared to 53%.

The Athletics Department works in alignment with other campus support programs, such as the Student Health Center, Office of the Dean of Students, and Counseling & Psychological Services. Student Athlete Financial Aid awards are overseen by the Director of Financial Aid. Appropriate policies and procedures are in place to address student appeals.

Student-athletes may receive institutional financial aid, financial aid based on athletic ability, and outside financial aid unrelated to athletic ability, or from an established and continuing program. The amount of aid is limited to certain educational expenses, up to the value of a full grant-in-aid, plus any other financial aid unrelated to athletics ability up to cost of attendance. The value of a "full grant-in-aid" and "cost of attendance" are set by the Financial Aid Office based on federal guidelines.

The Athletics Director reports directly to the President, who assures oversight and alignment with the University's mission and core themes. Policy documents can be found on the department's website and are governed by the University Athletics Committee, which meets once a semester.

MSU's Rodeo is a co-curricular athletic program under the umbrella of the Division of Student Success. This program is supported by the Bobcat Rodeo Booster organization, C.A.T. Rodeo Scholarship Association, and MUS Chute Boss Club. Information on scholarships, and Rodeo Team FAQ's can be found on the MSU Rodeo website.

2.D.14 **The institution maintains an effective identity verification process for students enrolled in distance education courses and programs to establish that the student enrolled in the distance education course or program is the same person whose achievements are evaluated and credentialed. The institution ensures the identity verification process for distance education students protects student privacy and that students are informed, in writing at the time of enrollment, of current and projected charges associated with the identity verification process.**

Students enrolled in distance education courses and programs use the same identity verification process as all other MSU students. Distance students receive information in writing regarding the authentication process along with their identification number (NetID) and a temporary password, with directions to change their password upon their first login. Students also are informed of the Student Code of Conduct, which describes institutional policy related to password sharing and fraud. There are currently no separate charges associated with identity verification.

Online classes offered through Brightspace (Desire2Learn or D2L) may require proctored/supervised examinations. Information regarding proctoring and exam administration policy can be found on Montana State Online website. This site describes the specific requirements for identification of a proctor site, related fees, as well as the required valid photo identification.

STANDARD 2.E: LIBRARY AND INFORMATION RESOURCES

2.E.1 Consistent with its mission and core themes, the institution holds or provides access to library and information resources with an appropriate level of currency, depth, and breadth to support the institution's mission, core themes, programs, and services, wherever offered and however delivered.

Consistent with the university's mission, the MSU Library offers research and information resources to the institution's students and faculty, as well as serving Montana citizens and the State's business community. The MSU Library's collections support teaching, learning and research at MSU, with particular emphasis in the fields of agriculture, science, health, and technology. Library collections are extensive and appropriate for the university mission, as outlined in the collection development policy statement.

MSU Library has a full range of collections and services for students and faculty. Professional librarians and staff provide assistance using the collections, access to online information resources, and instruction for individuals and groups.

The MSU Library has an acquisitions budget of approximately $5.8 million and spends the vast majority of those funds on electronic databases and journals for its students and faculty. These electronic resources may be used by any MSU student, staff or faculty member from anywhere in the world at any time through a proxy server that asks the user for credentials (NetID and password). The Library regularly monitors any new, modified, or discontinued programs to make adjustments to its collections, as appropriate. Anyone from the MSU community may make a request for items, which will be reviewed by librarian liaisons and the Head of Collection Development for consideration.

Special Collections
The MSU Library's Special Collections reflect MSU's commitment to assembling primary and secondary scholarly materials on specific topics supporting MSU curricular and research needs. These special collections continue to grow, even as growth of the general print collection has remained relatively static in recent years. For example, the Trout & Salmonid Collection may be the largest and most unique collection in the world devoted to the history and culture of angling, as well as scientific and historical materials related to trout and salmonid fish.

Other special collection areas include Montana history, Montana Native Americans, agriculture, Yellowstone National Park, and the Greater Yellowstone Ecosystem.

Special Collections became the proud home of the Ivan Doig Archive in 2015, and the entire collection was digitized and made available to the public in both digital and print forms in less than one year, in accordance with the proposal that had been submitted to Carol Muller Doig in September, 2015.

Other Digital Collections

The Acoustic Atlas is one of the largest natural sound archives focused on the American West. With nearly 3,000 sound recordings, the archive contains the sounds of birds, animals, reptiles, and amphibians, as well as ambient sounds of the environment of the Intermountain West and the Pacific Northwest.

ScholarWorks is an open access institutional repository for the capture of the intellectual work of Montana State University. ScholarWorks is a central point of discovery for accessing, collecting, sharing, preserving, and distributing knowledge to the MSU community and the world.

2.E.2 Planning for library and information resources is guided by data that include feedback from affected users and appropriate faculty, staff, and administrators.

Planning for library and information resources is guided by a MSU Library Strategic Plan (modeled on Montana State University's strategic plan), which is regularly assessed by data gathered from surveys and internal assessment. Surveys were administered to gather information on library users' opinions of service quality, and library staff's perceptions concerning organizational climate and diversity. Other survey tools provide data on campus faculty scholarly research and teaching-related topics. Survey results on perceptions of library service and quality, organizational climate and diversity, and faculty help to inform the decision-making process. The Usability Report for MSU Library Web Site documented another effort to determine how MSU could improve its website. These recent assessment efforts have focused on collecting and analyzing usability data in order to develop a set of recommendations designed to facilitate increased student use of library and information resources by improving the website's usability.

The Collection Development Committee's annual report outlines the five primary areas of activity: tangible information resources (books, videos, maps, etc.), e-resources, interlibrary loan (ILL), scholarly communication, and Acoustic Atlas. The MSU Library continuously looks for efficiencies to maximize time and resources and to identify ways to improve the library user experience. Furthermore, library liaisons to discipline-specific departments regularly gather feedback and requests from faculty to determine which information resources the library should purchase. Conversely, liaisons help negotiate with faculty when low-use databases or journals are considered for removal from the library's subscriptions.

The Collection Development department gathers annual statistics for use of physical and electronic collections. In FY2015, the number of searches of library databases was 1,169,016. Successful full-article requests from those databases or e-journals totaled 676,521 for a cost per download of $3.07.

2.E.3 Consistent with its mission and core themes, the institution provides appropriate instruction and support for students, faculty, staff, administrators, and others (as appropriate) to enhance their efficiency and effectiveness in obtaining, evaluating, and using library and information resources that support its programs and services, wherever offered and however delivered.

MSU's Library instruction Mission Statement is in alignment with MSU's Strategic Plan and includes the definition of information literacy published by the Association of College & Research Libraries' (ACRL) in their *Framework for Information Literacy for Higher Education*.

The instruction program at the MSU Library exists to teach information literacy to students, faculty, staff, and administrators and is designed to develop the ability to independently identify, select, analyze, and evaluate information for any purpose and use that information ethically. Serving the entire student body, the instruction program is fluid, evolving to meet student needs as technology modifies the way information is accessed, as curricular and administrative needs change, and as a result of program evaluation. The instruction program facilitates access to the vast resources available to the university, fosters a sense of independence and responsibility, and encourages a collaborative relationship between librarians and other faculty. The program teaches library users needed information, research methods, and skills through point-of-use, course-related, web-based, and credit course instruction and other approaches, thus supporting the overall educational mission of Montana State University.

Credit Bearing Courses and Information Literacy
Several courses are offered under the Library Science (LSCI) rubric

MSU Library's LSCI 121: Library Research Skills
Two credit course that focuses on concepts and skills needed to conduct library research. Emphasizing the use of electronic information sources, LSCI 121 provides students with a basic understanding of the library research process and with the skills to find necessary information for papers, presentations, and other class assignments. This course has wide applicability across disciplines, and is offered every semester.

LSCI491: Contemporary Approaches to Community Building Using Social Media.
During the fall semester 2016, the library offered this special topics course, designed as an interactive course. It explores social media from the perspectives of information analysis and community building. Students learn the theory and practice of civic engagement and community building through social media.

Additionally, several faculty teach credit bearing courses for other departments on campus, either as part of their regular contract, or as overload contracts. Courses include:
- LS491 (Liberal Studies): Literature Review Theory & Practice - 1-4 credits
- EDCI 522 (Education): Information Resources & Services - 3 credits
- EDCI 549 (Education): Applications of Literature for Children and Young Adults - 3 credits

2.E.4 The institution regularly and systematically evaluates the quality, adequacy, utilization, and security of library and information resources and services, including those provided through cooperative arrangements, wherever offered and however delivered.

The MSU Library conducts regular reviews of its subscriptions, evaluating usage levels, cost per use, and ongoing relevance to the curriculum. In response to these reviews, the Library adjusts subscription lists and deletes and adds titles each year based on findings, on budgetary constraints, and on faculty and student need. Assessment of these resources are not always easy to apply in objective terms, but can be inferred from usage patterns and from patron feedback, which is actively solicited by methods that include the Library Informatics and Computing Department Annual Report, which provides analytics on internet utilization as well as feedback on data management planning, and data management instruction. In 2017, the library completed a website-wide accessibility audit to ensure that library web resources are available to fauclty and students with disabilities. Along with their own annual review, the library regularly surveys students, faculty, and administrators (see 2.E.2). These surveys include:

- LibQUAL+ user survey - provides data related to library users' opinions of service quality
- ClimateQual staff survey – provides feedback concerning organizational climate and diversity
- Ithaka S+R Local Faculty Survey - provides data on campus faculty scholarly research and teaching-related topics.

The Library Informatics and Computing department, in collaboration with campus University Information Technology (UIT), conducts regular security checks, the reports for which are available on the Library staff intranet. Due to regular monitoring, proactive updating, prompt deployment, and other security measures, the Library Informatics and Computing department reported no web-based or local computing security incidents.

STANDARD 2.F: FINANCIAL RESOURCES

2.F.1 The institution demonstrates financial stability with sufficient cash flow and reserves to support its programs and services. Financial planning reflects available funds, realistic development of financial resources, and appropriate risk management to ensure short-term solvency and anticipate long-term obligations, including payment of future liabilities.

Montana State University (MSU) has a long-standing reputation for stability and excellence in financial management. It consistently operates within annual budgets. The experienced administrative leadership and staff use their expertise in areas such as budgeting for academic planning, and enrollment forecasting to ensure financial stability. That expertise and commitment to access and excellence at all levels significantly contributes to delivery of a robust student learning experience and demonstrates responsible stewardship of resources.

The State Legislature and the Board of Regents ("BOR") give each of the campuses autonomy to allocate resources to implement their campus strategic plans, with an appropriate level of BOR oversight. The Board sets all student tuition and fee changes, and gives strategic guidance to the Commissioner of Higher Education as to the methodology by which the Montana University System's state appropriated funding is allocated to each campus. MSU has greater autonomy in financial planning and budgeting for non-appropriated funds, e.g. auxiliary and other earned revenues, grants, and contracts. The internal allocation of funds is at the discretion of the campus administration and allocated in accordance with priorities outlined in the MSU Strategic Plan as well as recommendations from University Budget Council and other constituents.

Budget/Fiscal Departmental Managers, and the University Budget Office monitor all funds continuously to ensure funds are allocated and accounted for properly and within budget guidelines, and that funds are available for payment of short and long term debt and liabilities.

Reserves are permitted in the General Operating Budget to assure coverage of unexpected changes in revenue or expenses, to provide for retirement payouts, and to fund scholarships. A reserve for renewal and replacement of facilities funded by bond funds is required in the indenture and is held in investments by the bond trustee.

The University has a variety of revenue sources, including the following:
- General tuition and student fees support the education and general operations of the University.
- State Appropriation (administered according to BOR Policy 970.1 – Biennial Allocation of State Funding to Montana University System campuses) and a six-mill levy both support the education and general operations of the University. General fund money is provided to support Montana resident students. Non-residents pay over 300% of resident tuition, while Western Undergraduate Exchange (WUE) students pay 150% of resident tuition.
- Mandatory fees are charged to all students to support information technology, instructional equipment, recreational activities, student activities, academic buildings, athletics, health services and the student union building.
- Program fees are charged for students in specific courses of study to ensure that the quality of high-cost programs is achieved.

- Course fees are charged for specific courses having extraordinary expenses.
- Grants and contracts operations focus primarily on research and public service, and are supplemented with training and workforce/economic development grants as well. Grant and contract revenues are in the $110 million range annually, with fluctuations due to specific awards occurring each year. In 2016, total grant and contract expenditures were approximately $112 million. Facilities and administrative (F&A) revenues are managed by the Vice President for Research and Economic Development, who is advised by a committee regarding the distribution of funds. Grant income for facilities and administrative costs are allocated to appropriate parties, including a central pool for the Office of Sponsored Programs, and the Deans of their respective colleges.
- Sales and service fees fund auxiliary enterprises such as housing, dining, and parking.
- Land grant revenue, including timber sales from these lands, provides income that is pledged for debt service first, then available for any lawful purpose.
- Earnings from invested funds, primarily held in the State of Montana treasury, provide a small amount of income for operations. Earnings from endowments, held primarily at the MSU Alumni Foundation (MSUAF), provide spendable earnings for scholarships and other restricted purposes.
- Federal, state, and institutional financial aid programs provide funding to help eligible students pay for their educational expenses.
- The Perkins Loan Fund, the Nursing Loan Fund and the Nursing Faculty Loan program provide revolving funds available for disbursement to qualified students.

MSU financial statements show a history of financial stability. Audited financial statements are consolidated for all units of Montana State University. Annual audits have found no irregularities, and the few recommendations made by auditors have been appropriately addressed. Cash deficits in the general operating funds are not permitted by state law and any deficits in other funds are immediately addressed through the use of other funding sources or inter-entity loans. Negative cash balances in subfunds are not allowed for a period longer than seven days per state law.

2.F.2 Resource planning and development include realistic budgeting, enrollment management, and responsible projections of grants, donations, and other non-tuition revenue sources.

MSU engages in two levels of financial planning and budgeting. One is on the Montana University System level, the other on the MSU campus level.

At the MUS level, the BOR previously allocated the approved lump sum state appropriation to each campus. However, for FY2014 through FY2017, the Board allocated the appropriation to Montana State University and the University of Montana based on three year average resident full-time enrollment (FTE) for all affiliated campuses. For MSU, this includes the flagship campus in Bozeman, MSU-Billings, MSU-Northern, and Great Falls College MSU. MSU's campus affiliation developed an allocation model to distribute the appropriations to each campus based on campus-level enrollment averages, infrastructure, and other strategic considerations. Annual campus-level operation budgets reports and metrics approved by the BOR are available online.

Beginning FY2018, the BOR is returning to the campus level allocation of state appropriations. This is a first step in building a more comprehensive plan between state appropriation allocation, tuition and financial aid. The allocation methodology will still use resident student FTE as the primary driver in the distribution of funds. Other allocation drivers may include, but are not limited to, the cost of education, student to faculty ratios, and benchmarking with peer universities.

At the MSU campus-level the Office of Planning & Analysis and the University Budget Office collaborate with the Enrollment Management Committee to maintain a multi-year projection of enrollment, scholarships, tuition waivers, and tuition revenue. MSU is guided by the Strategic Plan for its allocation of general operating funds to its colleges and divisions, although the historic approach has been to increase budgets by the approved pay plan, inflationary adjustments, and any approved enhancements. In FY12 and FY13, a pool of funds was set aside for strategic investments that aligned with the approved MSU Strategic Plan. The investment proposals and Budget Council recommendations for FY12 and FY13 are posted on the Budget Council website. Currently, most of MSU's colleges and divisions have developed multi-year plans, or set of strategic initiatives they then use to allocate funding to departments and offices.

The Budget Office maintains a website that lists Annual Budget Reports and Budget Planning Documents to manage various planning activities throughout the fiscal year. Budget updates are emailed periodically to a Budget Users listserv to communicate current budget activity and timelines. Training on fiscal and budget management is held throughout the year.

Planning and development of other University funds, including restricted, loan, auxiliary, designated, and plant funds are ongoing and monitored on a regular basis by Budget/Fiscal Departmental Managers and University Budget Office. Budgets are entered into the University's budget system by individual department fiscal managers across the campus. Final budgets are reviewed by the University Budget Office to ensure that the projected revenues and expenditures were based on realistic assumptions and that each fund maintains a positive balance. In addition, the Office of the Vice President of Research monitors research funding, tracking new awards and revenue projections monthly. Academic Departments work closely with the MSUAF to project endowment and other donated funds available for scholarships and other operating uses. Self-supporting auxiliary enterprises report to the Vice President for Administration & Finance and work with the enrollment management team to project occupancy and related operations budgets for the housing enterprise and parking.

2.F.3 The institution clearly defines and follows its policies, guidelines, and processes for financial planning and budget development that include appropriate opportunities for participation by its constituencies.

The University Budget Council's charge is "To create, communicate and implement logical and easily understood fiscal processes that lead to fair budgetary guidance or resource allocations that directly support University strategic goals and priorities." The council has campus-wide representation and facilitates communication with the University community. It is the function of the Budget Council to assure that various constituencies are aware of and can participate in planning and budget actions.

The council continually reviews and discusses this process to make improvements. It is understood that the role of the council is advisory to the President, and makes recommendations rather than having decision-making authority.

The Budget Office maintains a website that lists Annual Budget Reports and Budget Planning Documents to manage various planning activities throughout the fiscal year. Budget updates are emailed periodically to a Budget Users listserv to communicate current budget activity and timelines. Training on fiscal and budget management is held throughout the year.

In fiscal year 2017, a new budget process and budget model was developed and employed by the Budget Council, informed by the work of the UPdate Budget Process workgroup. The budget process includes an 18 month timeline that allows the Planning Council to gather information and set priorities that drive the next budgeting cycle. The new budget model aims to:
  • Provide resources for strategic priorities
  • Provide transparency
  • Provide incentives to reward progress toward MSU's strategic priorities
  • Be dynamic, flexible and predictable
  • Provide adequate time for campus units to plan for and execute tactical elements
  • Enable effective decision-making at the appropriate organizational levels

The budget model uses student credit hours, majors, tenure track average salaries by discipline, Oklahoma State University (OSU) benchmark salaries for non-tenure track salaries and Delaware benchmarks as drivers for the academic affairs formulas. A weighted operating cost per FTE and average salaries within salary bands are used as formula drivers for other university units. It is expected that slight adjustments and modifications to the model will be made from year to year in order to improve its effectiveness in the future.

The new budget model outcomes resulted in base-budget increases of just over two million additional dollars into academic affairs and other university units in FY17 (Table 2.1). University constituents are extremely supportive of the new process and model as it allows for participation from the bottom up and provides opportunities for them to ask for funding for strategic initiatives and/or operational needs.

Table 2.1: FY17 Base Funding Increases

FY17 Base Funding Increases		
Division	**Final Amount Recommended**	**% of Total**
President	31,872	1.6%
Academic Affairs	1,563,308	76.4%
Admin & Finance	127,707	6.2%
Student Success	323,326	15.8%
Total	**2,046,213**	**100.0%**

2.F.4 The institution ensures timely and accurate financial information through its use of an appropriate accounting system that follows generally accepted accounting principles and through its reliance on an effective system of internal controls.

University accounting records are processed through the Banner accounting system. The system has been designed to make it possible to present financial statements in compliance with Generally Accepted Accounting Principles (GAAP) as well as Governmental Accounting Standards Board (GASB) requirements. The University maintains its accounting system and prepares its financial statements in accordance with the guidelines established by the College and University Business Administration, as published by the National Association of College and University Business Officers. The University's accounting fund structure is based on state law (Montana Code Annotated, 17-2-102). Banner accounting records are interfaced on a daily basis with the State's accounting system and are reconciled on a monthly basis.

The administration of MSU demands accountability and fiscal responsibility. Internal controls are an integral part of the financial and business processes designed to safeguard University assets, ensure compliance, check accuracy and reliability of data, segregate duties, and review authorizations and transactions. The University Business Services web page includes links to the business procedures manual and is updated regularly to provide guidance to financial managers and accounting personnel regarding the proper accounting and expenditure of funds and guidance for the safeguarding of customer information. In addition, the State of Montana Financial Services Division requires a control system (Montana Operations Manual 399 Internal Controls) and promulgates other accounting policies applicable to the University. The University performs its own risk assessment and document of key internal controls, which are regularly reviewed by University personnel and the Legislative Audit Division. In addition, the University has an internal audit function, the Office of Audit Services, which reports directly to the president and conducts independent evaluations of internal control processes.

All University revenues and expenditures are subject to the same framework of laws, policies and procedures. Revenues and expenditures are controlled through a process of fund controller approval, supervisory review, budgetary and internal controls, and adherence to federal, state, local, Board of Regents, and University laws, policies, and procedures. Vice presidents and deans have financial managers or accounting personnel who monitor compliance with state, federal and grantor regulations.

University financial statements are prepared annually, combining financial data for all of Montana State University's campuses and agencies. Individual campus information can be found in the Supplemental Information at the back of each annual report. Financial statements for the University pledged revenue funds, Bobcat Club, Museum of the Rockies, Inc., Montana PBS Public Television, KGLT Public Radio, and the MSU Alumni Foundation Inc., are also prepared and audited annually by independent audit firms.

All University funds and accounting systems are subject to financial audit by the Legislative Audit Division to determine whether the University financial statements are presented fairly and that the University has complied with laws and regulations having a direct and material effect on the financial statements. At the conclusion of a financial audit, a consolidated audit report is issued by the Legislative Audit Division and posted on the State website.

2.F.5 Capital budgets reflect the institution's mission and core theme objectives and relate to its plans for physical facilities and acquisition of equipment. Long-range capital plans support the institution's mission and goals and reflect projections of the total cost of ownership, equipment, furnishing, and operation of new or renovated facilities. Debt for capital outlay purposes is periodically reviewed, carefully controlled, and justified, so as not to create an unreasonable drain on resources available for educational purposes.

Montana State University's statutory source of capital construction and maintenance funds of educational facilities continues to be the State Legislature's Long Range Building Program (LRBP). MSU has developed a methodology for tracking and prioritizing capital building projects that includes deferred maintenance, renovations and new buildings. Utilizing a process that is guided by a set of principles to effectively and consistently evaluate a building program as a campus and a collection of affiliated campuses, prioritized project requests are submitted to the Office of the Commissioner of Higher Education (OCHE) and the Board of Regents (BOR) for approval and the State Legislature for authority and or funding.

Development of LRBP project requests utilizes a combination of Facilities Condition Inventory (FCI) analysis, Capital Project Planning, and Long Range Development Planning, which are aligned with the University's Academic and Strategic plans that reflect institutional core themes, in order to identify high priority institutional facility needs. The LRBP is a biennial process that includes 20 months of preparations leading up to the Legislative session. The new cycle begins immediately after the conclusion of each Legislative session. Within each of the five affiliate MSU campuses, individual priorities are established. These are then compiled into a comprehensive prioritized list of project requests that collectively represent the needs of Montana State University.

The combined list of proposed projects is presented to various campus governance bodies culminating with the President's Executive Council (PEC) for discussion and approval by the President. The approved list is then submitted to the OCHE and BOR for inclusion in the MUS LRBP program proposal. The top requests from throughout the university system are prioritized by the OCHE and BOR and then submitted to the Governor's Budget Office. The Governor's office, in turn, prioritizes all requests from all state agencies and includes only the highest priority requests in the official biennial budget proposal. This budget proposal is submitted by the Governor to the Legislative body for their consideration.

Once the list of LRBP projects is incorporated into the proposed budget, the list is sent to the Montana Legislature's Appropriations committee for recommendation and approval. Final approval of the project requests are incorporated into the appropriate Bills and voted on by the Legislature. All projects approved by the Legislature are administered by the Montana State Department of Administration's Architecture & Engineering Division in conjunction with the affiliated campuses.

Capital funds are received through the Legislature as described above for educational and administrative facilities, or through earned revenues and/or the issuance of bonds or other debt instruments for auxiliary and student activity facilities. The funds are for specific purposes contained in the MUS unit Long Range Building Plan and are specified at the time of the request to the Legislature or time of the debt issuance. Prior to issuance of bonds, debt service requirements including pledged revenues and debt payments, are scheduled for the life of the bonds. In addition, the University may also receive project specific funding through private donations and/or federal grants.

All debt financing is coordinated by the Vice President of Administration and Finance and the Associate Vice President for Financial Services in accordance with state law (Montana Code Annotated, 20-25-402). Financing plans and repayment sources are reviewed in detail to ensure adequate resources are available to pay short- and long-term debt. Since 1994, revenue bond issuances for all MUS campuses have been consolidated and cross-pledged, resulting in more favorable interest rates and credit ratings. A memorandum of agreement states that each campus will continue to service its own share of debt requirements.

The University engages in regular debt monitoring to ensure compliance with bond resolutions and other requirements. Debt schedules projecting income available to pay debt serviced throughout the life of the debt are maintained to ensure that future debt commitments can be met. Debt over $500,000 requires prior approval of the Board of Regents. The maturity and term of debt repayment is determined on the basis of expected availability of resources, other long term goals and obligations of the borrowing unit and the University, useful life of the assets being financed, and market conditions at the time of financing.

The University has received a credit rating from Moody's Investors Service (Aa3) and from Standard and Poor's (A+). These are very strong credit ratings, reflecting the strength of the University's financial position. Annual financial updates are given to the credit rating agencies and are searchable on the Electronic Municipal Market Access website for viewing by bondholders.

The University submits an annual report (2016, 2017) to the Board of Regents detailing all outstanding debt for the institution. Debt service payments for revenue bonds are made from net pledged revenue sources derived from auxiliary operations, land grant income, student fees, and certain facilities and administrative cost recovery funds. As a result, there is no depletion of resources available for educational purposes due to bond payments. An independent accounting firm audits the funds committed to bond indebtedness every year. Debt service coverage ratios for revenue bonds for FY2015 and FY2016 were 2.31 and 2.33, respectively. Debt service schedules for bond payments are maintained in the Administration and Finance Office for the lifetime of the debt. Annual debt service requirements are published in the footnotes of the financial statements.

2.F.6 The institution defines the financial relationship between its general operations and its auxiliary enterprises, including any use of general operations funds to support auxiliary enterprises or the use of funds from auxiliary services to support general operations.

The auxiliary enterprises subfund is maintained independently of general operations funds in accordance with state law (Montana Code Annotated, 17-2-102-(4)(iv). Revenues and expenses associated with educational and general activities are separately recorded and distinguished from transactions impacting auxiliary enterprises. Auxiliary Services' revenue producing facilities are operated in compliance with Montana Code Annotated, 20-25-302. Parking operations are also governed by state law (Montana Code Annotated, 20-25-312).

Administrative costs incurred in education and general funds to support auxiliary enterprises are recovered through an overhead cost distribution schedule. The distributed cost-share amounts are determined based on the use of the service by auxiliaries and the reasonable cost of that service.

Additionally, the auxiliary enterprise has facility use agreements with the university to cover the cost of occupancy for state-funded operations in auxiliary buildings. These include the Student Union Building (SUB), Fitness Center, Fieldhouse, Danforth Chapel, and Save Our Barn (SOB).

2.F.7 For each year of operation, the institution undergoes an external financial audit, in a reasonable timeframe, by professionally qualified personnel in accordance with generally accepted auditing standards. Results from the audit, including findings and management letter recommendations, are considered in a timely, appropriate, and comprehensive manner by the administration and the governing board.

The University is, by law, subject to audit by the State of Montana Legislative Audit Division (LAD). LAD conducts annual financial audits of all University funds in accordance with generally accepted auditing standards. LAD also performs biennial compliance audits. The primary objectives of the compliance audits are to determine compliance with regulations relating to contract and grant expenditures, other governmental financial assistance, and to test compliance with requirements of selected state laws, regulations, and rules. Results of compliance audits are included in the statewide biennial Montana Single Audit Report, which meets the requirements of the US Office of Management and Budget's (OMB) Circular A-133.

In addition to the LAD audits, independent audits are performed annually for revenue bonds, Intercollegiate Athletics, Montana Public Television, KGLT Public Radio, and the MSU Alumni Foundation. The NCAA agreed-upon procedures engagement is conducted annually in conjunction with the Intercollegiate Athletics audit. Financial or program reviews of sponsored programs are conducted as deemed necessary by the sponsoring agency or government. MSU's internal audit function, the Office of Audit Services, also conducts financial, operational and compliance audits of University units and processes.

The LAD and independent auditors issue audit reports that may include audit findings and recommendations. University management provides written responses detailing corrective action to be taken in response to all audit recommendations. For LAD audits, internal audit compiles these written responses and prepares a corrective action plan that includes target implementation dates to monitor and ensure that timely corrective action occurs. Audit reports are presented to University management, the Legislative Audit Committee, and the Board of Regents.

2.F.8 **All institutional fundraising activities are conducted in a professional and ethical manner and comply with governmental requirements. If the institution has a relationship with a fundraising organization that bears its name and whose major purpose is to raise funds to support its mission, the institution has a written agreement that clearly defines its relationship with that organization.**

The Montana State University Foundation, Inc., d/b/a Montana State University Alumni Foundation, was established in the state of Montana as a Montana nonprofit corporation in 1946. MSUAF is recognized by the Internal Revenue Service as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. MSUAF is organized and operated for the sole and exclusive benefit of Montana State University, an institution of higher learning and an agency of the state of Montana, and as such is a public charity as described under Sections 509(a)(1) and 170(b)(1)(A)(vi) of the code. MSUAF's stated mission is to cultivate lifelong relationships and secure private support to advance Montana State University.

MSUAF advances the goals of MSU through the solicitation, investment, and stewardship of financial support for MSU, as well as through broad-based alumni engagement. MSUAF expands philanthropy in support of MSU, advances awareness of MSU and its programs and priorities, and promotes MSU and community partnerships. Additionally, MSUAF conducts broad-spectrum, coordinated annual fund-raising campaigns, targeted major and planned gift efforts, and occasional special fundraising initiatives to provide support for MSU's needs and initiatives.

As an independent entity, MSUAF's business affairs and property are managed by, and all corporate powers of MSUAF are vested in, the MSUAF Board of Governors. The Board of Governors is responsible for the control and management of all assets of MSUAF, including the prudent management of all gifts made to MSUAF consistent with donor intent and according to all applicable laws. The governors have adopted a code of ethics for members of the Board of Governors, for staff, and for others who serve on standing committees of MSUAF. This code of ethics reflects the Council for the Advancement and Support of Education (CASE) standards, as well as industry best practices as recognized by the Association of Governing Boards (AGB). Additionally, MSUAF has a well-defined written investment policy, established in collaboration with its retained investment consultant, a gift acceptance policy, fund administration policy, and numerous other governance policies including both conflict of interest and whistleblower policies.

The MSU/MSUAF relationship is carefully guided by a Memorandum of Understanding (MOU) between the two entities. This MOU is renegotiated and renewed every two years (unless otherwise agreed upon) and is reviewed and approved by the Board of Regents for the Montana University System.

STANDARD 2.G: PHYSICAL AND TECHNOLOGICAL INFRASTRUCTURE

Physical Infrastructure

2.G.1 Consistent with its mission, core themes, and characteristics, the institution creates and maintains physical facilities that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support the institution's mission, programs, and services.

University Services is primarily responsible for not only maintaining the university's physical facilities and assets, but it is also responsible for ensuring that those facilities are ready to provide safe, secure and sufficient space and qualities for a learning environment that supports the university's mission and strategic plan.

University Services is located within the Division of Administration and Finance. It consists of various specialized departments that plan, design, construct, and maintain the physical environment, ensuring the quantity and quality of learning spaces. The specialized departments include Facility Services (FS), Campus Planning, Design & Construction (CPDC), Safety and Risk Management (SRM), and Space Planning and Management (SPM).

FS teams with CPDC to conduct regularly scheduled facilities condition inventories of all campus building resources. FS developed a Facilities Conditions Inventory software application to conduct these inventories that won an APPA (Association of Physical Plant Administrators) Effective and Innovative Practices Award and has been adopted by most Montana state agencies. Buildings are on a three year rotation for inspection. Teams of Trades staff, Architects, Engineers, and Planners tour all buildings on MSU and MUS campuses to ascertain level of deferred maintenance. Data collected during these audits are used to determine maintenance projects in future funding years.

FS is responsible for ensuring that the campus built and natural environment is safe, accessible, operational, clean, and visually attractive. Maintenance of the buildings, grounds and infrastructure contributes to that sense of place experience and is fundamental in achieving the university's mission to continue its recruitment and retention of quality students, faculty and staff. FS has an annual budget of approximately $11 million dollars dedicated to target categorizes such as Major Maintenance, Corrective Maintenance, Scheduled Maintenance, Preventative Maintenance, Classroom Maintenance, Custodial Services, Refuse, Heat Plant Operations & Maintenance, and Utility Systems Maintenance.

MSU has been active in the construction of new buildings and facilities in recent years, including the Animal Bioscience building (2010), Gallatin Hall (2013), Jabs Hall (2015), Miller Dining Hall (2015), Yellowstone Hall (2016) and a new parking structure (2017). Ongoing projects include Norm Asbjornson Hall and a new dining hall. A complete list of projects is maintained on the CPDC website.

Led by CPDC, ongoing efforts since 2007 have resulted in upgrades to all academic buildings in compliance of the American's with Disabilities Act. The Americans with Disabilities Act Facilities Advisory Committee (ADFAC) guides strategic efforts to improve accessibility throughout the campus. Auxiliaries Services, FS and CPDC systematically completed many ADA specific upgrades as well as renovation projects that have included recommendations from the ADFAC. Recommendations have included projects that replace older interior room signs that are not compliant with current ADA mandates, update and modernize campus building entries and restrooms, and improve accessibility to classroom facilities. In the past seven to eight years, CPDC has worked with various campus entities including FS, the Provost's office, and Auxiliaries, to appropriate funding towards ADA projects. Auxiliaries Services recently completed approximately $2.25-million in ADA related upgrades in Residence Hall facilities, including providing universal access to specially programmed floors. In addition, with respect to signage, CPDC works with individual campus departments to update their signage to compliant types when they do remodels of their spaces or request it. A complete list of ADA plans for each campus building is posted on the University Services, Campus Planning, Design and Construction website.

CPDC has also been instrumental in creating a Classroom Committee. The Classroom Committee is a standing committee of the University Facilities Planning Board and acts as an advocate for classroom modernization and improvements, pedagogical shifts in support of the university academic mission, and utilization improvement methodologies. The Classroom Committee has been successful in advocating for more than $8-million-dollars in classroom improvements and modernization projects over the course of the last five years.

Also within University Services, Safety & Risk Management assists in maintaining safety-related elements of the physical infrastructure, as well as fostering a safe working and learning environment. SRM assists in maintenance and inspection of fire detection and suppression systems, eyewashes and safety showers, and oversight of the University's fire extinguisher contract. This unit partners with the local fire department to perform weekly fire code inspections of campus buildings.

Continuous improvement is an on-going effort. The University has added an automated system to assess job hazards and to provide employees with a list of required health and safety training; has led a Request for Proposals (RFP) for a new campus-wide chemical inventory system; is partnering with other campus entities to let a Request for Information (RFI) for a staff learning management system; and is adding business resilience/continuity as a part of the unit. Please see section 2.G.2 for additional information on safety elements. Other safety training conducted by Auxiliaries Services is ongoing food service training to ensure consistent adherence to standards of proper and safe food storage, handling, preparation, and service.

The Office of Space Planning and Management, located in University Services, was created in the fall of 2016 and hired the Managing Director in November 2016; the office is now fully staffed with a Space Analyst that joined in February 2017. The office serves as a professional resource for space items for the entire MSU-Bozeman campus and provides effective stewardship of all University spaces, including preparing accurate and timely space inventory and utilization reports to inform decision-makers about short- and long-term space needs. SPM is charged with the stewardship of

all campus spaces and to review, maintain and analyze spaces to assist University leadership and administrative units to use MSU space assets in an efficient yet flexible manner to support the university mission.

The input from advisory committees under University Services is diverse and collaborative and principally comes from organized committee groups. These include:
- University Facilities Planning Board (UFPB)
- Space Management Committee
- Public Art Committee.
- Parking and Transportation Advisory Committee.
- ADA Facilities Advisory Committee
- Campus Sustainability Advisory Council
- Classroom Committee
- Planning Council
- Bicycle Task Force

2.G.2 The institution adopts, publishes, reviews regularly, and adheres to policies and procedures regarding the safe use, storage, and disposal of hazardous or toxic materials.

MSU has an overarching Environment, Health & Safety (EHS) policy that was created by an institutional committee with the intent of "maintaining a campus environment for students, faculty, staff, volunteers, and visitors that will not adversely affect their health, safety and surrounding environment, or subject them to risks of accidental injury or illness." MSU has two health and safety units – the Office of Research Compliance (ORC) and Safety & Risk Management (SRM) – that establish and review EHS programs that fall under the institutional policy. These programs mandate that hazardous and/or toxic materials be used, stored and disposed in a compliant manner that protects staff, students, community and environment.

Research involving hazardous and toxic materials is governed by MSU's Institutional Biosafety Committee (IBC), Radiation Safety Committee (RSC), and Environment Health & Safety Committee (EHS). All three Committees are charged with developing, reviewing and disseminating safety related policies and procedures. Dissemination of these policies and procedures occurs through publishing on the respective safety websites, through list serves, and through training. To ensure adherence with policies and procedures, MSU employs a Biosafety Officer, Radiation Safety Officer, Chemical Safety Officer and a Hazardous Waste Manager who oversee the day-to-day operations of the safe use, storage, and disposal of hazardous and toxic materials.

The IBC and the Biosafety Officer annually reviews the MSU Biosafety Manual, which defines the policies and procedures pertaining to the use of biological materials at MSU. The IBC and the Biosafety Officer have also developed an IBC Manual, Biological Toxin policy, Dual Use of Research Concern Policy, Laboratory Specific Biosafety Manual (which can be downloaded from a link on the Biosafety manual page) and Pathogen Safety Data Sheets that outline the safe use of biological materials. Additionally, a Biohazardous Waste Disposal policy and Autoclave Quality Assurance policy have been developed for proper disposal of biohazardous materials.

The RSC, in conjunction with the Radiation Safety Officer, has developed numerous policies and procedures that include radioactive package deliveries, personnel monitoring, radioactive materials handling guidelines, and radioactive waste disposal. These policies and procedures are available on the [Radiation Safety website](#).

SRM, along with the EHS Committee, assists in maintaining a safe working and learning environment, disseminating health and safety information, and enhancing positive safety culture. SRM has established processes for hazardous waste use, storage and disposal, and has additional guidance on lab occupancy/vacating. Chemical labs, stock rooms, and academic spaces are regularly inspected for compliance. SRM has both a Chemical Safety Officer, and also a Hazardous Materials Manager to implement, monitor, and continuously improve these programs.

MSU performs regular preventive maintenance on building safety systems such as fire detection and suppression systems, fume hoods and biosafety cabinets, ventilation systems, and eyewashes and safety showers. Additionally, MSU has implemented an automated system to assess job hazards and to provide individuals with a list of required health and safety training; added an on-campus laboratory training room to teach various safety courses; and updated its chemical safety program. Safety for campus stakeholders is an ongoing priority, and safety is one of the four primary pillars of MSU's Service Excellence program. Both ORC and SRM sit on a Laboratory Safety Advisory Board that meets quarterly to discuss lab safety and culture with University leadership.

2.G.3 The institution develops, implements, and reviews regularly a master plan for its physical development that is consistent with its mission, core themes, and long-range educational and financial plans.

MSU originally published a master plan in 2008, the [Long Range Campus Development Plan](#) (LRCDP). The consensus planning effort began with identifying overarching guiding principles with detailed goals. The master plan included development scenarios, based on the university's mission and vision, growth projections and administrations focus, that illustrated profiles of the physical campus within 10 years, 25 years and beyond.

The university has been successful in utilizing the 2008 LRCDP for major land use and physical development decisions since its inception. Since the LRCDP master plan was prepared, phased implementation has begun. The Plan proposes an incremental approach to implementing the principles, elements and fundamental strategies of the framework plan. Vital factors such as student population growth, academic plans, research, five-year vision goals, and logical development of the campus districts will have a bearing on the programmatic needs of the campus physical environment. The Plan is an investment in the future of the institution. It is a useful tool in linking the university's mission and vision to the physical learning environment and is a quantitative tool for assessing the university's growth strategy.

In general, the institution continues to rely on the guiding principles of the LRCDP master plan document, and specifically Campus Planning, Design & Construction and Facilities Services regularly review and incorporate strategies outlined in the LRCDP in planning, designing and constructing projects. The principles, goals and concepts outlined in the LRCDP remain relevant and in support of the university's core mission.

2.G.4 Equipment is sufficient in quantity and quality and managed appropriately to support institutional functions and fulfillment of the institution's mission, accomplishment of core theme objectives, and achievement of goals or intended outcomes of its programs and services.

Consistent with MSU's mission and core themes, MSU's information technology equipment and services are managed to support institutional functions. MSU's University Information Technology (UIT) supports 19 student computer labs for general student use, with 11 of those designed for instructional use. The UIT Computer Labs are distributed throughout campus, including the SUB, the Libraries and the Writing Center. Approximately 570 computers are available for general student use. This represents an increase of 50% since 2014.

Computers in the UIT Computer Labs are maintained with identical software and applications including 40 software suites and 100 applications. Use of student labs is robust with user statistics showing labs 100% occupied during most days by 10:00am. During fall semester 2016, more than 15,000 unique users had logged into general access machines. UIT also maintains 11 public access printers located in computer labs and other high traffic locations around campus. Students are provided with up to 250 sheets of subsidized printing each semester funded from the Student Computing Fee. All faculty, students and staff receive a free MSU BOX account for unlimited file storage. Student labs are staffed with 14 User Support Associates who provide hands-on assistance for students in three locations. Student Computer Labs may be reserved for instructional and other training activities. Computing labs for use by students are also maintained and supported by colleges and departments across the campus.

Technology enhanced classrooms are designed to meet the MSU strategic goals and Core Themes Learning, Integration, Discovery, and Engagement. The equipment in classrooms and other collaborative learning spaces is supported by the UIT instructional technology staff who provide installation, maintenance and on-call technical support. The instructional technology staff participate in the campus Classroom Committee to advise and guide planning for maintenance, upgrades and new construction. Classroom equipment includes smart podiums with audio/video switching in 90% of the Registrar controlled classrooms. Some rooms are equipped with full video-conference room systems and are available for classes and other use by faculty and students.

The campus technology team deployed and supports three Technology Enhanced Active Learning (TEAL) classrooms that enhance teaching and learning by integrating networking, computers and audiovisual technologies in flexible learning spaces. These technologies provide faculty with an opportunity to enrich the educational experience and engage students in active learning. The university has more than 190 technology enhanced spaces (classrooms, seminar rooms, and study areas) including off-campus locations for the WWAMI (Washington, Wyoming, Alaska, Montana, Idaho) medical school program and Gallatin College.

The campus also supports additional learning technology for faculty use including: student response systems (iClicker) in 50% of classrooms; TechSmith Relay lecture capture available for faculty recordings and student viewing, and a campus-wide WebEX license that provides all faculty, staff and students with a WebEX account to enhance collaborative learning activities.

Technological Infrastructure

2.G.5 Consistent with its mission, core themes, and characteristics, the institution has appropriate and adequate technology systems and infrastructure to support its management and operational functions, academic programs, and support services, wherever offered and however delivered.

Data Center & Infrastructure
MSU's main campus supports two robust and high availability Data Center facilities located in AJM Johnson Hall and Renne Library. The AJM facility provides 700 square feet of data center space and rack unit availability of 462Us. The power system consists of three-phase enterprise grade power protection, uninterrupted power supply (UPS), supported by a diesel generator backup. The Renne facility provides 1500 square feet of data center space and rack unit availability of 786Us. This facility is outfitted with three-phase enterprise grade power protection via multiple UPS units, and is supported by two (2) 150kW generators. MSU Data Center facilities are supported 24 hours, seven days a week, and 365 days per year. Support services include real-time system monitoring, video surveillance, motion detection, and forced door entry alarm notification to protect critical system and equipment infrastructure.

UIT supports a local area network called MSUNet. MSUNet also maintains a ubiquitous wireless infrastructure across almost all campus buildings used by students. This environment supports, on average, more than 40,000 unique client connected endpoints maintaining 1 GB of traffic on MSUNet.

Enterprise Resource Planning
Ellucian's Banner product enables core administrative functions and services across the campus as well as the Montana State University system (all four MSU campuses), and is supported by University Information Technology Enterprise Services Group (20 team members in total), in collaboration with business partners across the campus. Student management, Financial Aid, Human Resources, Grant management, Finance, and Accounts Receivable functions are served. More than 50 ancillary services (both hosted and on premise), integrate with the central Enterprise Resource Planning (ERP) system to support business requirements. Banner is the core system from which data flows to ancillary services or agencies. Examples include online payment transaction systems, parking management systems, campus housing management systems, and student customer relationship management systems.

Portfolio Management Office
In support of enterprise technology initiatives, the Portfolio Management Office (PMO) supports planning and coordination of prioritization to ensure proper alignment with business objectives and strategic planning efforts. The PMO is a 4 member team, and coordinates with several technical and business functions across the system to ensure proper strategic alignment of new technology implementation efforts.

Prioritization occurs as a cross-campus planning effort to identify and prioritize projects with the goals of common practice for technology investment, best practices for deployment, and reduced cost of ownership across the MSU system.

Research Cyberinfrastructure

University Information Technology provides support to faculty, staff and students via several key initiatives. This support includes a Research Cyberinfrastructure team (RCi), a community high performance computing cluster, and a network core devoted to the movement of research data at high speeds to collaborating institutions in addition to a science DMZ ("demilitarized zone," a specialized secure network described later in this section).

The RCi team aims to provide MSU Researchers with the cyber-infrastructure and support they need to remain on the cutting edge of their fields. The RCi team provides initial user training and on-boarding, ongoing system administration, consultation and support.

RCi is also a major component of The Data Infrastructure & Scholarly Communication (DISC) group, which seeks to increase research productivity at Montana State University by providing MSU researchers with computational, data, and digital resources and expertise in order to elevate research capacity and improve Research Support. This is a collaborative effort among the UIT, the Library and the Office of the Vice President for Research to provide additional research-specific resources.

In 2015, the University created a science demilitarized zone (term of art used by the Department of Energy) to support the high-speed transfer of research data to collaborating institutions over the campus wide area network. This local investment was augmented with federal investment from NSF to create "on lanes" to the Science DMZ in seven research intensive buildings on campus through the Bridger Research Network.

MSU has installed the largest super computer in the state of Montana, a Research Computing Cluster called Hyalite, which has 1080 cores, 2800 gigabytes of RAM, and 620 terabytes of storage. Hyalite serves 238 users averaging 6,726,030 CPU hours annually and growing. Hyalite is available to all MSU researchers at no cost. The only requirement is that users complete a session of basic training provided by the RCi team.

Information Security

The security of Montana State University's information and infrastructure is managed by the Information Security Group within UIT. The Associate Chief Information Officer & Chief Security Officer oversees the group consisting of an Information Security Manager and two Security Analysts. Information Security services include security awareness activities, data loss prevention, vulnerability management, intrusion detection and prevention, management of endpoints, anti-malware, and other services providing wired and wireless network and systems security.

2.G.6 **The institution provides appropriate instruction and support for faculty, staff, students, and administrators in the effective use of technology and technology systems related to its programs, services, and institutional operations.**

Support for Faculty, Staff, and Students
The Center for Faculty Excellence (CFE), established in Fall 2011, provides training and support to faculty in using technology in the classroom as part of its overall program. The Center's workshops focus on the pedagogy of using lecture capture, polling software, and other technology tools.

In 2016 the CFE added a full-time instructional designer to assist all faculty in their efforts to incorporate technological tools into their teaching and in teaching face-to-face classes. The CFE offers workshops on the use of technology and teaching at a distance as well as one-on-one consultations. The instructional designer facilitated a Faculty Learning Community that met to improve their online classes. The Instructional Designer also serves as a liaison between the CFE and University Information Technology in the use of the course management software Brightspace.

The CFE employs a part-time Technology Fellow, who is a member of the university faculty. This individual provides technology training in the use of polling software and is also available for one-on-one assistance. The CFE provides training and on-going support to the Technology Enhanced Active Learning (TEAL) instructors as well as conducting faculty and student assessments of those classrooms.

Students and faculty have access to DegreeWorks, a degree audit system. The Office of the Registrar and the Office of Academic Affairs provide support to faculty and students for the use of this tool as these offices continue to build upon its capabilities.

Support for Brightspace by D2L (Learning Management System)
Brightspace by D2L (originally known as Desire2Learn) has been the campus learning management system since 2008. UIT employs a team of 3.0 FTE to support faculty and students using the tool. Support is provided in a variety of ways to make training and support as accessible as possible for faculty. The team offers face-to-face workshops, web-based tutorials and materials, online instruction, and one-on-one consultations. In addition the team provides customized departmental training, new faculty orientation, and workshops in special areas of need. In AY17 UIT entered into a pilot agreement to provide 24/7 helpdesk service in collaboration with Brightspace.

Support for Classroom Technology
The UIT Instructional Technology unit includes 4.0 FTE responsible for installation, maintenance, and repair of classroom technology. This team provides support for faculty using technology in more than 100 classrooms. Support for classroom technology includes video, audio, lecture capture, iClickers, and video conferencing. The team also supports two Technology Enhanced Active Learning Classrooms with multiple computer, audio, and video feeds. In AY18 the UIT Instructional Technology Unit will deploy an advanced cloud service for lecture capture, captioning, and editing (TechSmith Relay and Camtasia) and a One Button Studio facility to provide faculty with equipment and technical support for video capture.

UIT Service Desk & Desktop Support
The UIT Service Desk and Desktop Support provide technical support for computing, hardware, software services, networking, and telecommunications to students, staff, and faculty at Montana State University.

UIT Training
The UIT Marketing and Communications team offers a variety of online training resources, and one-on-one consultations to faculty, staff and students at Montana State University. All new services are rolled out with standard training information and frequently asked questions, in addition to training videos when applicable for the implementation of new tools such as Box and WebEx. Additionally, Information Security Training is provided as part of the formal Banner training program and the New Employee Orientation.

2.G.7 Technological infrastructure planning provides opportunities for input from its technology support staff and constituencies who rely on technology for institutional operations, programs, and services.

University Information Technology is the provider of central information technology services to Montana State University. The CIO, who reports directly to the President, sits on the President's Council and the Academic Leadership Council, giving a direct line of communication between the IT division and all other departments. The Enterprise Resource Planning (ERP) Operations Team is a four campus affiliated team comprised of business area stewards and technical membership. Team members collaborate regarding operational decisions around the ERP system, upgrade timing, testing procedures and communication to the broader constituent base.

The Help and Information website is the public face for IT, serving all four campuses. It receives requests at a staffed help desk station via phone and email. Service and support requests are tracked on a help desk software system.

Other venues for communication and input are the campus networking group and regular systems administrator meetings, such as the Data Governance Council, established to address strategic direction with regard to data accuracy, and the IT Security Council, a forum for coordinating security behaviors across administrative and academic units throughout the system. The purpose of these groups is to facilitate information sharing, definition of best practices, and identification of threats/needs, and to identify appropriate professional development opportunities. The Instructional Technology Advisory Council (ITAC) and the Online Learning Advisory Committee (OLAC) are appointed by the Provost and CIO with representation from faculty, staff, and students across campus. These two groups routinely discuss, review, advise, and recommend to the Provost and CIO on issues related to classroom and campus technology. They also initiate and advise on surveys to gain insight from faculty and students. The manager of the UIT Instructional/Classroom technology team sits on the MSU Classroom Committee to inform, advise and recommend ongoing planning and implementation for existing classrooms and instructional labs, as well as for technology implementation in new construction. The High-Performance Computing Advisory Group (HPCAG), established in November of 2015, is focused on providing user-centric advice on high performance computing and related cyberinfrastructure services. The group provides technical

guidance and advice on the configuration and operation of Montana State's High Performance Computing ecosystem and assists with needs assessment and development of long-term strategy. The HPCAG group is advisory to the Chief Information Officer.

There are email alert systems at multiple levels for campus communication of system outages, maintenance and other issues. IT has a campus-wide technology project request process to facilitate IT support for technology-related projects and construction. The IT Security Department has implemented campus-wide incident response procedures for coordinated and rapid action on any security related incidents.

2.G.8 **The institution develops, implements, and reviews regularly a technology update and replacement plan to ensure its technological infrastructure is adequate to support its operations, programs, and services.**

UIT and MSU administration maintain the Lifecycle Capital Replacement and Enhancement Plan, which was first developed in 2003. It provides ongoing funding for scheduled replacement of central servers, storage devices, networking and telecommunications equipment. MSU's central servers and storage area networks are replaced every four years under this plan, and network switches and routers are on a seven-year replacement cycle. Warranties and on-site maintenance contracts are also included and funded with all new server and storage purchases. Investments (for both UIT lifecycle replacements and new initiatives) come from the Lifecycle Capital Replacement and Enhancement Plan, and are prioritized by UIT leadership and reviewed with senior MSU administration annually. All infrastructure and telecommunications related investments managed by UIT are funded out of this plan.

UIT is responsible for annual fixed costs for infrastructure, hardware, software and network equipment support and maintenance contract renewals. Fixed costs are not dependent on any activity or service that UIT provides or that generates revenue, but instead are constant and only change with an inflationary increase. UIT typically receives a ~5% yearly increase to help cover these costs. The amount of the increases could be dependent on University's need for the equipment, software and services contracted.

Technology updates to classrooms and student labs are funded by student Equipment and Computer fees. UIT receives 30% of the student computer fee (CFAC) each year to maintain and refresh equipment in UIT supported computing labs. The equipment in these labs is currently on a three-year replacement cycle. Support for UIT classroom equipment is provided from the Equipment Fee Allocation Committee (EFAC) UIT submits a proposed budget outlining planned technology replacements and enhancements for classroom and teaching environments to EFAC. The committee reviews proposals and funds projects based upon MSU prioritization and availability of resources.

Standard 3

INSTITUTIONAL PLANNING

The institution engages in ongoing, participatory planning that provides direction for the institution and leads to the achievement of the intended outcomes of its programs and services, accomplishment of its core themes, and fulfillment of its mission. The resulting plans reflect the interdependent nature of the institution's operations, functions, and resources. The institution demonstrates that the plans are implemented and are evident in the relevant activities of its programs and services, the adequacy of its resource allocation, and the effective application of institutional capacity. In addition, the institution demonstrates that its planning and implementation processes are sufficiently flexible so that the institution is able to address unexpected circumstances that have the potential to impact the institution's ability to accomplish its core theme objectives and to fulfill its mission.

STANDARD 3.A – INSTITUTIONAL PLANNING

3.A.1 **The institution engages in ongoing, purposeful, systematic, integrated, and comprehensive planning that leads to fulfillment of its mission. Its plans are implemented and made available to appropriate constituencies.**

Institutional planning at Montana State University (MSU) is a highly integrated and collaborative process. Overseen by the highest administrative levels, the process of institutional planning incorporates data, assessments, recommendations, and observations from units around campus. The flow of information from students through the Associated Students of Montana State University (ASMSU) and faculty and staff through their college administrative structures and their representative bodies including Faculty Senate, Professional Council, and Staff Senate is provided to the Dean's Council, Planning Council, Outreach & Engagement Council, IT Council, Budget Council and ultimately to the University Council and the President. These councils include members from academic and non-academic units across campus and provide opportunities for input into comprehensive planning.

MSU photo by Kelly Gorham

The Office of Planning and Analysis (OPA) publishes and makes public annual strategic plan progress reports that track progress towards the objectives identified for each core theme, document strategic priorities and investments made by the institution, and celebrate successes that demonstrate movement toward MSU's strategic objectives. These reports are mailed to a broad audience of internal and external constituents. Internally, these recipients include deans, directors and department heads. Externally, these constituencies include college advisory boards, the alumni relations advisory board, Bozeman City and Gallatin County commissioners, tribal council chairpersons and tribal college presidents, Friends of the MSU Library, the Museum of the Rockies Board of Trustees, and the presidents and chancellors of other public land-grant universities. The director of OPA provides updates on progress towards strategic objectives to the Planning and the University Councils and makes these goal updates public on the Planning Council website. Each core theme is presented at a meeting sometime during the academic year and each spring a summary report addressing all core themes is presented.

MSU's Strategic Plan is the overall guiding comprehensive planning document and includes objectives for stewardship of the campus and MSU's physical facilities. In addition, MSU has a Long Range Campus Development Plan (LRCDP) that preceded the Strategic Plan and continues to inform campus development.

University Strategic Planning
Members of the Planning Council (PC) are tasked with shepherding the strategic plan, communicating about it widely, bringing feedback on the plan to the council, and assessing progress on the plan. The chair of the Planning Council, the Director of the Office of Planning and Analysis, reports on progress in specific goal areas at each monthly meeting of the Planning Council and of the University Council (UC), so the entire plan's status is reviewed annually in public in more than one forum. An announcement of the core theme update to be presented to UC is shared with all faculty and staff approximately one week prior to the meeting in an email from the President. The reports

are then posted on the PC website. Additionally, the plan updates to UC are regularly covered by the local media. A complete progress report is printed and distributed annually to campus and community constituents and published online.

During the 2014-2105 academic year, the Planning Council, which comprises representatives from college, employee, and student governance groups, began an annual strategic prioritization process. In Spring 2015, the PC recommended four objectives within the strategic plan as priorities for the 2016-17 academic and fiscal year, based on input from deans, Faculty Senate, campus units, environmental scans, and a campus questionnaire. Those recommendations were considered and endorsed by the President and her leadership team in the summer of 2015 and communicated to the other governance councils and the employee governance organizations. This development of strategic priorities by the PC was repeated in 2016 and most recently in 2017. By prioritizing approximately a year ahead of the budget allocations, units can begin program planning and develop experiments or "small bets" directed at the strategic priorities that can be incorporated into their budget requests.

At the time of this self study, the completion of the first planning-budget-assessment cycle had just concluded, with a summary report delivered to UC at its May 2017 meeting. Overall assessment of the strategic plan continues as well.

Physical Facilities Planning and Design
MSU's Long Range Campus Development Plan was endorsed by the university in 2008. The plan is a shared vision for the physical development of the campus environment that was developed through an inclusive and collaborative process of meetings, community and university workshops, and a multiple intensive review process over a three-year period. The LRCDP is a plan to guide the development of physical resources for the next 25-50 years, and has been flexible in accommodating the enrollment growth experienced since 2009 (the date of MSU's last self-study). Campus Planning Design and Construction (CPDC) is responsible for the oversight of the LRCDP and has developed complementary campus plans including the 2012 Landscape Master Plan (LMP) and the 2017 Transportation Master Plan (TMP). Campus development is also informed by the 2011 Climate Action Plan (CAP) which was prepared by the MSU Campus Sustainability Advisory Council as an outline to reduce campus greenhouse gas emissions and comply with the American College and University Presidents Climate Commitment.

Diversity Planning
During the 2016-17 academic year, the University engaged in a public and sustained dialogue about diversity on campus, guided by a steering committee that solicited participation and input from stakeholders across the campus and community. The resulting draft Diversity and Inclusion Plan adds depth and specificity to existing strategic plan elements related to diversity and will guide the next strategic plan's efforts toward recruitment, retention, and development and support of diverse faculty, students, and staff.

Additional Planning Efforts
Other campus wide efforts have focused on specific areas within the University's strategic plan in support of MSU's mission. The OpenMSU and UPdate MSU initiatives centered primarily on the Stewardship and Learning core themes, developing integrated action and assessment plans to address

those areas. Open MSU's focus on service excellence, for example, led to the development of service excellence training and recognition in support of the Stewardship (human resources) core theme. UPdate Advising continues through the ongoing efforts of the Campus Advising Action Team, in support of the Learning (graduation focused) and Access (supporting a diverse student body) core themes. Individual units and divisions have engaged in strategic planning at a more local level, consistent with the direction set in the University's strategic plan. Examples include the College of Letters and Science, College of Engineering, Gallatin College, the Library, and Athletics.

Ultimately, the design, implementation, and assessment of the strategic plan supports and nurtures the Mission of the University. The Core Themes Learning, Discovery and Engagement form the pillars that support the university mission and Integration, Access and Stewardship represent the firm base on which the land-grant mission of the institution is planted.

3.A.2 The institution's comprehensive planning process is broad-based and offers opportunities for input by appropriate constituencies.

As illustrated in Figure 3.1, institutional planning is a process that is both ongoing and broad based. This timeline represents an overview of some of the planning highlights since 2009.
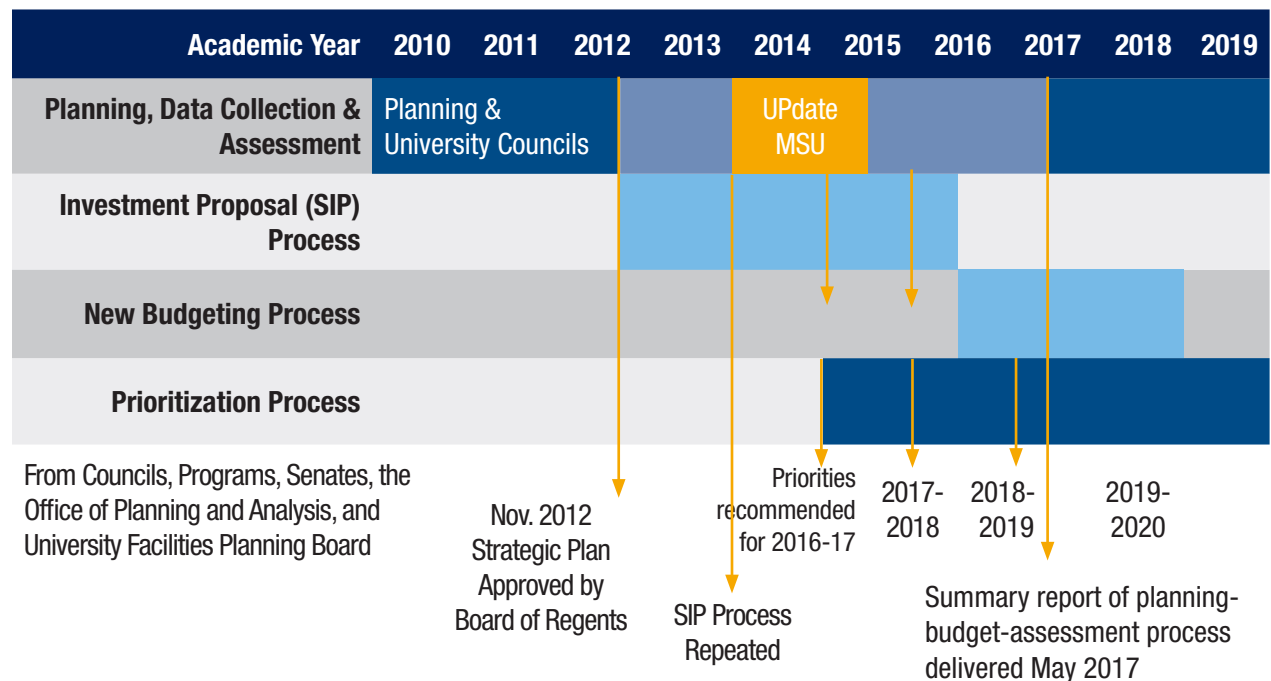

Figure 3.1: Institutional Planning Timeline

The strategic plan was developed over an 18-month period from 2010-2012 that was led by a Strategic Planning Committee (SPC), a 45-member panel with broad representation from the University and community. The SPC conducted and evaluated a SWOT analysis to start the strategic planning process in 2011 and to direct the development of mission and vision statements. The SPC developed core themes, strategic objectives and performance indicators based on the newly developed mission in April 2011 and May 2012. The mission, values, vision, goals, objectives and metrics were presented in two town-hall-style meetings, a design charrette, and online with comment opportunities that generated more than 100 comments. The draft was also presented to campus and community groups at their invitation. After review by the University Council and the President, the plan and the core themes were formally adopted in September 2012 and endorsed by the Board of Regents (BOR) of the Montana University System at the November 2012 meeting (see page 16-17 of linked document for action item). Between November 2012 and September 2014, MSU (though the planning process) refined the core themes.

At the September 17-18, 2014 BOR meeting, MSU's revised core themes were approved. In doing so, the original four Core Themes Educate Students, Create Knowledge and Art, Serve Communities, and Integrate Learning, Discovery and Engagement were transformed into the six core themes currently used today: Learning, Discovery, Engagement, Integration, Access and Stewardship. MSU's strategic plan had an immediate impact by setting overarching goals for the university and challenging every member of the MSU community—students, faculty, staff and community partners—to contribute to its success.

As an ongoing planning process, the Office of Planning and Analysis (OPA) collects, tracks, and regularly presents updates on progress towards MSU's core theme objectives at Planning Council (PC) meetings where members consider the appropriateness of indicators and of the strategic plan targets. Institutional-level data on the core theme performance indicators (also called metrics) are updated as new data are available and reviewed by University Council (UC) at least twice a year to track progress towards core theme objectives. A short summary of the progress update to be presented to UC is shared with all faculty and staff prior to the meeting in an email from the President. Feedback from UC, which broadly represents the four-campus MSU community, is relayed to PC for consideration in priority setting and in evaluating progress on the plan.

PC meetings are public and agendas are posted 48 hours in advance. Additionally, PC solicits input from Deans, Faculty Senate, and other campus organizations from time to time on specific topics related to the strategic plan.

3.A.3 The institution's comprehensive planning process is informed by the collection of appropriately defined data that are analyzed and used to evaluate fulfillment of its mission.

The Strategic Planning Committee conducted and evaluated a SWOT analysis to start the strategic planning process in 2011. The plan, as adopted and subsequently honed, includes both specific numeric targets and quantitative indicators for each of its objectives. These are collected and reported annually. Generally, one goal/core theme per month is presented to UC and PC, the latter of which assumed responsibility for monitoring and reporting progress on the plan in Summer 2012. The Office of Planning and Analysis is responsible for data collection, coordinating, and reporting with relevant units across campus.

The strategic planning process and ongoing plan assessment rely on the collection of internal and external data to describe the environment, evaluate progress, and suggest areas for improvement. Performance indicators (MSU calls these metrics) were defined during the planning process and some have been revised in the interim to make data collection both possible and meaningful. The PC is tasked with regularly revisiting the strategic plan including core themes, objectives, and performance indicators, and may make recommendations to the UC if members believe that objectives or indicators are not appropriately aligned with MSU's mission and core themes. Major changes to indicator definitions are authored by PC ad hoc subcommittees and then approved by PC and UC. Minor changes are authored by PC ad hoc subcommittees, then presented to PC and UC as information items within the annual update in each goal area.

PC reviews each performance indicator to assess progress towards core theme objectives at least annually and conducts a deeper review into several indicators each year. These in-depth reviews include additional data collection and interviewing stakeholders and experts in relevant areas in order to determine the next budget cycle priorities from among the many objectives in the strategic plan. PC meeting minutes archive these activities, and are available online for open access and transparency.

In addition to strategic plan indicators, PC and UC receive regular reports from OPA, University Budget Office, Academic Affairs, and various student support functions, on related data (Key Performance Indicators, Activity Insight, Academic Analytics, budget and expenditures, student success outcomes) that inform the status and direction of the university. Individual units have also identified their own appropriate performance indicators to track progress of their strategic programs, often with support from OPA and other offices on campus.

3.A.4 The institution's comprehensive plan articulates priorities and guides decisions on resource allocation and application of institutional capacity.

The strategic plan includes six overarching core themes, with multiple objectives, all with performance indicators that are assessable and measurable. Immediately after the formal adoption of the strategic plan, the university budget office revised its year-old Strategic Investment Proposal (SIP) process to require that all budget requests align with the newly revised core theme objectives. The SIP process was led by Budget Council. Proposals and annual assessments were evaluated based

on their strategic alignment to core themes, institutional benefits, and alignment with the Montana University System strategic plan goal of spending 70 percent of institutional funding on instruction, academic support, and student services.

In the initial year, Budget Council invited the authors of 31 proposals (out of more than 70) to give public presentations, after which they were questioned by the council, students, faculty and staff. In the end, 16 proposals were selected for either one-time-only or recurring funding. Each proposal was required to describe its alignment with one or more objectives of the strategic plan.

The SIP process was repeated in the fall of 2013. Over the next two years, programs that received funded proposals had to submit regular assessment reports, which were evaluated by Budget Council. From those reports, Budget Council determined whether to continue funding, increase funding or discontinue funding.

Through this SIP process, the university has allocated resources in the form of one-time-only and base budget increases to numerous programs and initiatives that are in alignment with the plan, including: extra course sections for enrollment growth process; performance funding; distance education faculty development dollars; faculty start-ups and more as outlined in Table 3.1 below. Additional investments included University wide participation in events during the Year of Engaged Leadership in 2013 to develop additional capacity and enthusiasm for outreach, engagement and leadership; Planning Council's Strategic Plan Prioritization process, which impacted budgeting in fiscal year 2017 and 2018; and most recently a new budget model implemented for fiscal year 2017. The new budget model included two pools for investment in strategic plan priority-related "small bets" and strategic results rewards for prior efforts that moved the university forward on strategic plan indicators. The recently completed 2018 budget process requires that all monies, not just new dollars but reallocation of fiscal resources, directly align with strategic plan objectives recommended through the Planning Council's prioritization process.

In aggregate, these efforts have directed millions of dollars into alignment with MSU's strategic plan. Table 3.1 below documents dollar allocations in support of core theme objectives since 2011 and includes both one-time-only and base-budget investments in a) additional course sections to ensure that students were able to register for the courses that they needed during a period of enrollment growth in support of the Core Theme Learning objective, b) performance funding for investments in projects that supported increased undergraduate degree completion rates and retention rates objectives, c) Strategic Investment Proposal initiatives that explicitly support core theme objectives, d) strategic results investments that incentivized and rewarded successful initiatives in prioritized objectives, e) Native American Initiatives directed at recruitment, retention and graduation of Native students in support of Access objectives , f) faculty development for distance education in support of Access, g) research support for faculty in support of Discovery and Integration objectives and h) support for new faculty hires and research startup packages, supporting all core themes. As evidenced by the totals at the bottom of the table, nearly 75% of these investments went to instructional and student success initiatives through the Office of Academic Affairs (Provost) and the Division of Student Success.

Table 3.1: Investments in Core Theme Initiatives 2011-2017

	Admin & Finance	ITC	President	Provost	Research	Student Success	Grand Total
Enrollment Growth				$7,855,200		$143,445	$7,998,645
One-time-only				$3,000,000			$3,000,000
FY11				$1,200,000			$1,200,000
FY13				$600,000			$600,000
FY14				$600,000			$600,000
FY15				$600,000			$600,000
Base				$4,855,200		$143,445	$4,998,645
FY12				$1,555,200		$143,445	$1,698,645
FY13				$1,500,000			$1,500,000
FY14				$600,000			$600,000
FY15				$600,000			$600,000
FY16				$600,000			$600,000
Performance Funding				$2,199,927		$450,490	$2,650,417
One-time-only				$2,199,927		$450,490	$2,650,417
FY15				$1,641,926		$225,245	$1,867,171
FY16				$558,001		$225,245	$783,246
Strategic Investments Proposals	$322,500	$575,530	$653,347	$4,757,894		$2,385,018	$8,694,289
One-time-only	$309,500	$381,882	$514,355	$3,110,823		$1,561,118	$5,877,678
FY12	$283,500		$45,000	$214,664		$270,630	$813,794
FY13			$135,500	$325,000		$275,000	$735,500
FY14		$115,800	$140,028	$869,531		$790,379	$1,915,738
FY15	$13,000	$131,082	$143,048	$949,400		$101,082	$1,337,612
FY16	$13,000	$135,000	$50,779	$706,228		$124,027	$1,029,034
FY17				$46,000			$46,000
Base	$13,000	$193,648	$138,992	$1,647,071		$823,900	$2,816,611
FY13				$741,697			$741,697
FY15						$722,373	$722,373
FY16			$138,992	$385,403		$69,772	$594,167
FY17	$13,000	$193,648		$519,971		$31,755	$758,374
Strategic/ Results Pool	$165,000	$33,500	$134,409	$970,046	$37,500	$133,325	$1,473,780

	Admin & Finance	ITC	President	Provost	Research	Student Success	Grand Total
One-time-only	$165,000	$33,500	$134,409	$970,046	$37,500	$133,325	$1,473,780
FY17	$165,000	$33,500	$134,409	$970,046	$37,500	$133,325	$1,473,780
Native American Initiative Pool				$800,000			$800,000
One-time-only				$800,000			$800,000
FY11				$800,000			$800,000
Distance Ed Fac Dev Pool				$500,000			$500,000
One-time-only				$500,000			$500,000
FY11				$500,000			$500,000
Univ Research Support					$3,732,418		$3,732,418
One-time-only					$3,732,418		$3,732,418
FY14					$2,300,000		$2,300,000
FY15					$1,344,418		$1,344,418
FY17					$88,000		$88,000
Faculty Startups					$2,562,909		$2,562,909
One-time-only					$2,562,909		$2,562,909
FY11					$74,000		$74,000
FY13					$581,845		$581,845
FY14					$901,718		$901,718
FY15					$633,891		$633,891
FY16					$371,455		$371,455
Tenure Faculty Pool				$3,500,000			$3,500,000
Base				$3,500,000			$3,500,000
FY13				$2,000,000			$2,000,000
FY17				$1,500,000			$1,500,000
Grand Total	**$487,500**	**$609,030**	**$787,756**	**$20,583,067**	**$6,332,827**	**$3,112,278**	**$31,912,458**
% of Total	**1.5%**	**1.9%**	**2.5%**	**64.5%**	**19.8%**	**9.8%**	**100.0%**

3.A.5 The institution's planning includes emergency preparedness and contingency planning for continuity and recovery of operations should catastrophic events significantly interrupt normal institutional operations.

As a commitment to maintain a safe, secure, disaster resistant, and resilient university, MSU has created an Emergency Management Coordinator position and an Emergency Operations Plan (EOP). In addition, the Emergency Management Task Force meets regularly to address emergent issues in emergency management.

In the development of the EOP, the university employed emergency planning guidance, best practices, and regulations at the local, state, and federal levels as well as higher education specific sources. The following documents and sources were referenced during the planning process:
- Local: Gallatin County Emergency Management Plan
- State: Montana Emergency Response Framework (MERF)
- Federal:
  · FEMA Comprehensive Preparedness Guide (CPG)
  · FEMA Guide for Developing High-Quality Emergency Operations Plans for Institutions of Higher Education
  · Americans with Disabilities Act (ADA)

MSU's EOP provides a framework in which the university, along with its officials, units, departments, offices and campus community, can work to prevent, prepare for, respond to, and recover from the effects of emergencies and disasters. An Emergency Management Administrative Responsibility Chart outlines the organization structure that ensures assessment and improvement of the EOP.

This plan accomplishes the following:
- Identifies the policies, responsibilities and procedures required to protect health and safety, University property, and mitigate the environmental effects of natural, technological or human-caused emergencies and disasters.
- Establishes the emergency management organization required to mitigate a significant emergency or disaster affecting Montana State University.
- Establishes the operational concepts and procedures for the coordination of field response with Montana State University's Emergency Management Committee (EMC) and Emergency Operations Center (EOC) Group activities.

In addition to the MSU's EOP, authority for University Law Enforcement to respond to emergencies and to take protective actions to safeguard its community is set forth in the following directives: Montana Code MCA 20-25-321
Board of Regents Policy 1006 Security Operations

STANDARD 3.B: CORE THEME PLANNING

3.B.1 Planning for each core theme is consistent with the institution's comprehensive plan and guides the selection of programs and services to ensure they are aligned with and contribute to accomplishment of the core theme's objectives.

MSU's core themes are direct translations of the institution's comprehensive strategic plan. As discussed in Standard 3.A.4, new or expanded programs are evaluated for alignment with the core theme objectives. The institution's core themes were assigned goals, performance indicators, and targets intended to measure the adequacy of programs and services. Core theme indicators are assessed regularly by the PC for determining the extent of mission and core theme fulfillment, and, if needed, appropriate actions are decided upon for programs, services, projects, and initiatives that support the core themes.

3.B.2 Planning for core theme programs and services guides the selection of contributing components of those programs and services to ensure they are aligned with and contribute to achievement of the goals or intended outcomes of the respective programs and services.

The intent of the strategic plan and core theme objectives is to guide and inform strategic decisions without constraining the tactics that will help achieve the objectives. The strategic plan annual reports demonstrate the great diversity of strategies that have been successful. As intended, and often in surprising and effective ways, the plan has empowered individual units to conduct successful planning, by envisioning their contributions, developing their own paths to the goals outlined, and furthering the University's success in diverse and creative ways that support the institution's mission and values. While the PC and UC oversee the strategic plan and core themes generally, different units have taken the lead in planning for assessment and improvement for each core theme. MSU faculty and staff have been incrementally planning in many complementary areas.

Academic program planning has occurred through the established planning processes, including department, college, Faculty Senate, Deans' Council, and Provost review and critique before external review by the Office of the Commissioner of Higher Education (OCHE), the BOR, the other MUS campuses, and the Northwest Commission on Colleges and Universities (NWCCU). This process has been further refined over the last year at the state system level to include an intent-to-plan step that encourages cross-campus collaboration and review in the very early stages of academic program planning. Academic programming and budgeting are referential to the MSU strategic plan, and in the most recent cycles, to the priorities recommended by the PC.

Personnel resources have been subject to systemic planning and assessment in three ways. A university-wide systemic diversity planning effort in 2016-17 has resulted in a thorough and far reaching draft diversity plan to guide recruitment, retention, and professional development of students, faculty, and staff. Additionally, the Open MSU and attendant projects like Service Excellence have guided human resource planning, staff organization, and professional development programs. Finally, faculty hiring proposals are subject to review by the college dean, Deans' Council, and the Provost, for alignment with strategic plan goals, academic program plans, and enrollment growth.

Physical planning also refers to the MSU Strategic Plan and to the existing Long-Range Campus Development Plan (LRCDP) that lays out "neighborhoods" for development. Newly constructed campus buildings are sited in congruence with the physical locations identified in the LRCDP, and programming for new and renovated buildings is in alignment with strategic plan goals and objectives.

In addition to building and renovation, physical planning efforts over the last seven years include transportation, bicycle, and climate planning. The University Facilities Planning Board reviews these plans at the outset of the planning process and at their conclusion.

Leadership teams in colleges and units across the university are responsible for day-to-day and long-term planning in their own programs, departments or units, and they also have representation on the councils defined in Standard 3.A above. This allows for information about planning to flow back and forth from individual units to the highest administrative levels on campus.

3.B.3 Core theme planning is informed by the collection of appropriately defined data that are analyzed and used to evaluate accomplishment of core theme objectives. Planning for programs and services is informed by the collection of appropriately defined data that are used to evaluate achievement of the goals or intended outcomes of those programs and services.

The core theme planning process and ongoing core theme assessment rely on the collection of internal and external data to describe the environment, evaluate progress, and suggest areas for improvement. Performance indicators for each core theme were defined during the planning process, and some have been revised in the interim to make data collection both possible and meaningful. The PC is tasked with regularly revisiting the core themes, objectives, and performance indicators, and may make recommendations to the UC if members believe that objectives or indicators are not appropriately aligned with MSU's mission and core themes. Major changes to performance indicators are authored by PC ad hoc subcommittees and then approved by PC and UC. Minor changes are authored by PC ad hoc subcommittees, then presented to PC and UC as information items within the annual update in each goal area.

The strategic planning process resulted in core themes (goals), objectives, and performance indicators that allow the University to track progress toward the core theme objectives and to revisit often where improvements can be made. The bulk of the campus-wide and external data for informing core theme planning and assessment are collected or assembled by the Office of Planning and Analysis. All core theme performance indicators (also called metrics at MSU) are posted online and shared in PC and UC meetings, where analysis and evaluation are carried out. Budget Council also considers core theme indicators when allocating strategic investments.

Each core theme encompasses two to four strategic plan objectives, which can be considered as sub-themes within each Core Theme. All programs and initiatives considered for implementation at MSU are evaluated with respect to how they propose to contribute to core themes and strategic plan objectives. The actual performance indicators for each core theme are thoroughly listed in Standards 1 and 5. Requests for investments in new or existing initiatives must also propose assessment activities, specifically how to assess the extent to which the programs/initiatives generate returns that genuinely contribute to the success of students, faculty, staff and the larger institution.

Core Theme 1: Learning
MSU prepares students to graduate equipped for careers or further study.

These objectives focus on:
- "prepare" – assess and improve student learning of critical knowledge and skills,
- "to graduate" – increase graduation rates at MSU, and
- "equipped for careers and further study" – increase job placement and further education rates.

Performance indicators then track performance in each objective; for example, graduation rates clearly measure performance on the second objective, while additional indicators that measure the absolute number of degrees awarded at different levels reflect the integrated spirit of the plan. Increasing graduation rates could be accomplished by restricting access, which would violate another core theme, so MSU monitors both kinds of measures.

Core Theme 2: Discovery
MSU will raise its national and international prominence in research, creativity, innovation and scholarly achievement, and thereby fortify the university's standing as one of the nation's leading public research universities.

These objectives focus on:
- "prominence" – elevate the research excellence and recognition of MSU faculty,
- "fortify" – enhance infrastructure in support of research, discovery and creative activities, and
- "public research universities" – expand the scale, breadth and quality of doctoral education.

Performance indicators then track performance in each objective; for example, to support its standing as a public research university, MSU must recognize that its doctoral program is small compared to other public research universities. Therefore the university tracks faculty involvement in doctoral education, doctoral degree production, and student scholarly productivity. Because objectives for Discovery and Integration overlap, MSU specifically tracks scholarly output co-authored, co-created, or co-presented with faculty.

Core Theme 3: Engagement
Members of the Montana State University community will be leaders, scholars and engaged citizens of their local, national and global communities, working together with community partners to exchange and apply knowledge and resources to improve the human prospect.

These objectives focus on:
- "working together with community partners" – strategically increase service, outreach and engagement at MSU,
- "local, national and global communities" – MSU graduates will have global and multicultural understanding and experiences, and
- "leaders" – MSU students, faculty and staff will have increased opportunities for leadership development.

Performance indicators then track performance in each objective; for example, to ensure that MSU is providing opportunities for leadership development, the university tracks both the number of on-campus leadership trainings for faculty and staff and self-reported faculty involvement in other leadership-development experiences like Harvard's educational management programs or HERS. Training better leaders also reinforces the prominence of MSU's students, faculty, and staff, which supports Core Theme Discovery as well.

Core Theme 4: Integration
By integrating learning, discovery and engagement, and by working across disciplines, the MSU community will improve the world.

These objectives focus on:
- "integrating" – increase the integration of learning, discovery and engagement, and
- "working across disciplines" – increase work across disciplines.

Performance indicators then track performance in each objective; for example, to track progress on integrating learning, discovery, and engagement, MSU asks the faculty to identify which courses, independent learning experiences, research and creative projects, and engagement activities actually cross traditional boundaries. For example, faculty identify service learning (integration of learning and engagement), community-based participatory research (integration of discovery and engagement), or scholarship produced with students (integration of learning and discovery). A project may be all three, which exemplifies the objective perfectly, while it also supports the previous three core themes.

Core Theme 5: Access
Montana State University is committed to widening access to higher education and ensuring equality of opportunity for all.

These objectives focus on:
- "widening access" – educate more students while maintaining the quality of programs, and
- "equality of opportunity" – diversify the student body.

Performance indicators then track performance in each objective; for example, one way to widen access is to make distant delivery of educational programming possible, so MSU tracks the number of online courses as well as the enrollment in those courses measured by student credit hours. Providing wider access for some audiences requires additional financial assistance, so the university measures the percentage of financial need that is met (based on federal student aid criteria (FAFSA)), which helps to hold the institution accountable for raising and distributing more aid.

Core Theme 6 Stewardship
As steward of a land-grant institution, MSU will responsibly manage its human, physical, economic and environmental resources in an open and sustainable manner.

These objectives focus on:
- "human" – attract, develop and retain the best faculty and staff to achieve the MSU mission,
- "physical" – enhance aesthetic appeal and functional quality of MSU physical resources to support high quality learning, research and work environments,
- "economic" – increase and effectively allocate resources in support of the MSU Strategic Plan, and
- "environmental" – promote sustainable stewardship and a culture of resource conservation at MSU.

Performance indicators then track performance in each objective; for example, attracting and retaining the best faculty and staff depends in part on competitive compensation, so MSU regularly compares salaries to comparable markets and positions. Developing the faculty and staff and helping them perform professionally requires professional development opportunities, so the university tracks the number of campus-based training sessions for faculty and staff and their enrollments.

In addition to the core theme performance indicators, units planning for programs or strategies often use the strategic plan performance indicators or work with OPA to define and plan for the collection of appropriately defined data that can be used to evaluate achievement of the goals or intended outcomes of those programs and services.

Standard 4

EFFECTIVENESS AND IMPROVEMENT

The institution regularly and systematically collects data related to clearly defined indicators of achievement, analyzes those data, and formulates evidence-based evaluations of the achievement of core theme objectives. It demonstrates clearly defined procedures for evaluating the integration and significance of institutional planning, the allocation of resources, and the application of capacity in its activities for achieving the intended outcomes of its programs and services and for achieving its core theme objectives. The institution disseminates assessment results to its constituencies and uses those results to effect improvement.

Eligibility Requirement 22 – Student Achievement

Student learning outcomes for each degree and certificate program are available on department websites and a list of these websites is available on the Office of the Provost Academic Assessment website. Core 2.0 learning outcomes are available on the Office of the Provost Core 2.0 website. Student learning outcomes are regularly assessed within the annual academic and Core 2.0 program assessment process. Program reviews provide an additional level of regular and systematic assessment. By means of this assessment, MSU demonstrates that students achieve stated learning outcomes.

Eligibility Requirement 23 - Institutional Effectiveness

As documented in this self-study, Montana State University (MSU) systematically applies clearly defined evaluation and planning procedures and the results are published at appropriate periods. The campus assesses the extent to which it achieves its mission and core themes, and information regarding institutional effectiveness is regularly published on campus websites and in materials sent to the Montana Board of Regents (BOR), as well as to students, faculty, staff, alumni, and the MSU community. These assessment activities occur at every level of the campus (department, program,

college, and university). Internal and external environments are regularly monitored, and MSU constituencies continue to provide data and recommendations to ensure that the campus remains viable and sustainable into the future. Through its governance structure, MSU ensures that all constituencies are apprised of its fulfillment of mission and achievement of goals.

Standard 4 – Effectiveness and Improvement

Each spring Planning Council (PC) reviews the strategic plan performance indicators, considers progress towards core theme objectives, and collects and reviews input from across campus in order to make meaningful recommendations for the prioritization of specific objectives a year in advance of when budget decisions will be made. Based on priorities forwarded by the Dean's Council and the Faculty Senate and identified by faculty and staff through a questionnaire, PC recommends prioritized objectives to the President each spring to focus investment in a future fiscal year. This allows time for resource allocations to be directed to priorities through the annual budget process. For example, spring 2015 PC recommendations applied to FY2017. This process has been repeated with PC identifying strategic priorities for fiscal 2018 and 2019 (available Fall 2017).

In addition to the PC, several initiatives and working groups have been created to assess different aspects of the strategic plan. One example is the UPdate MSU initiative that President Cruzado announced in October 2014. This initiative was an institutional project comprised of 12 working groups addressing the following goals: 1) Free up resources currently tied to administrative duties and reallocate them to the Learning, Discovery and Engagement goals of the strategic plan; 2) Better coordinate functions across departmental lines and diminish the duplication of efforts; and, 3) Examine economies of scale to enhance administrative efficiency and effectiveness. The working groups' membership covered a full range of students, faculty and staff participation.

The reports from these groups are available online (see links in Table 4.1). Many of the recommendations and implementations are referenced throughout this report. For instance, specific examples from the Advising and Scholarship groups are included in the Core Theme Learning section.

Table 4.1: UPdate MSU Working Groups

Working Group	Core Theme Alignment
UPdate MSU Advising	Learning, Stewardship, Access
UPdate MSU Budget Process	Stewardship
UPdate MSU Core/General Education	Integration, Learning, Discovery, Engagement
UPdate MSU Data Access/Consistency	Stewardship, Access, Integration
UPdate MSU Faculty Governance	Stewardship
UPdate MSU Institutional Research	Stewardship, Integration
UPdate MSU Online Ed/Extended U	Stewardship, Integration, Discovery
UPdate MSU Procurement Services	Stewardship, Access, Learning
UPdate MSU Scholarship Administration	Stewardship, Access, Learning
UPdate MSU Space Planning	Stewardship, Integration, Learning, Discovery
UPdate MSU Talent Management	Stewardship, Access, Learning, Discovery, Engagement

In the following sections, each core theme is described with its assessment and improvement processes, along with examples and spotlights on additional programs that align with the respective core theme.

CORE THEME 1: LEARNING	
Description:	Since its inception, MSU has prepared graduates to meet the challenges of tomorrow. Successful, sought-after graduates are part of the institution's legacy, and preparing students is central to its mission. MSU students learn in the classroom, lab, studio and field, through a hands-on, student-centered curriculum that integrates learning, discovery, and engagement in and out of the classroom.
Goal Learning (L):	MSU prepares students to graduate equipped for careers and further education.
Objectives:	L.1: Assess, and improve where needed, student learning of critical knowledge and skills. L.2: Increase graduation rates at MSU. L.3: Increase job placement and further education rates.

Learning is one of the pillars of MSU's mission (See Fig. 1.1, in Standard 1) and its strategic plan. The development, provision of support for, and assessment of strategies for the learning core theme are critical to demonstrate MSU mission fulfillment. Assessment of learning at MSU also recognizes that improvements resulting from learning assessments for new academic programs or changes in existing academic programs will likely influence planning and implementation in other core theme areas.

Assessment and improvement of learning are overseen by the highest administrative levels (University Council and the President) and governed by the collaborative institutional planning process described in Standard 3. Academic Affairs and the Division for Student Success collaborate to assess and improve the learning experiences for students across campus. In the assessment of educational programs and services, faculty have the primary role. Other leaders in assessment for learning are Dean's Council, Associate and Assistant Dean's Council and Faculty Senate, who evaluate data, assessments, recommendations, and observations from departments, programs and units around campus.

The Core Theme Learning timeline (see Figure 4.1) below provides a sample of the assessment and improvement processes for Core Theme Learning with examples of strategies and programs that are mentioned in this section. The text that follows provides a description and evidence to illustrate how MSU meets the standards for assessment and improvement. First, Standards 4A and B are addressed; second, evidence to support those standards are offered with examples that outline the assessment, planning and improvement process as it operates for selected programs, and third, featured spotlights that document MSU's commitment to learning are provided. Of special importance for learning is the tracking of progress towards comprehensive academic program assessment at MSU provided below in Table 4.2 and Table 4.3.
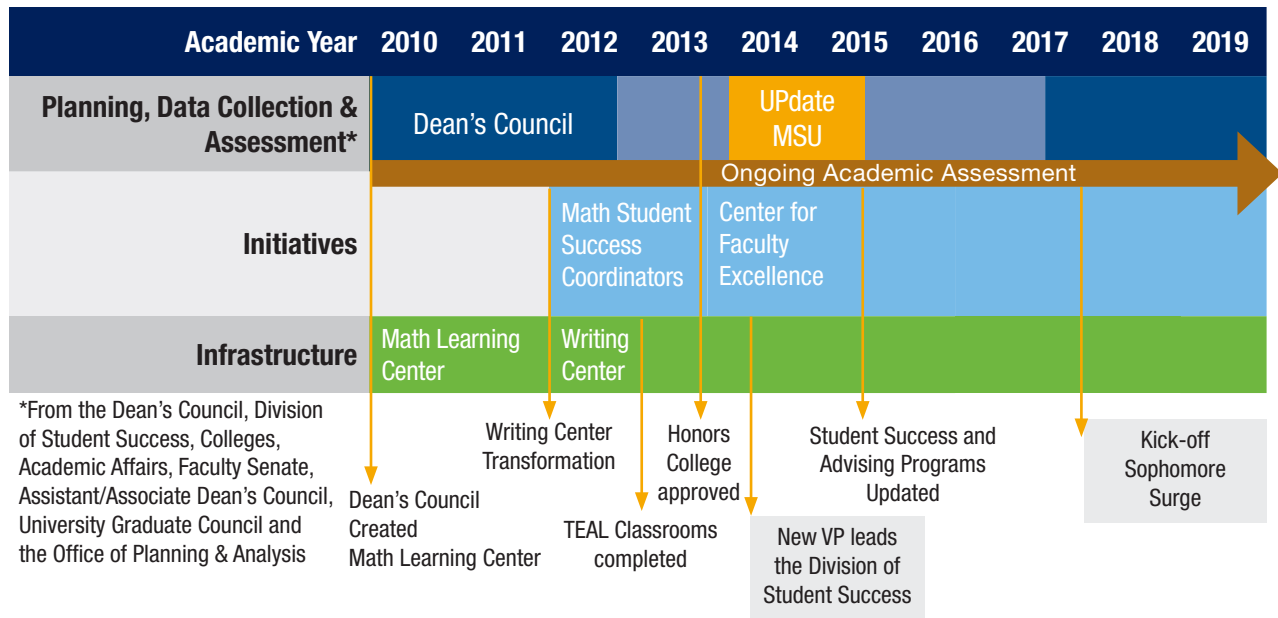
Academic Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Planning, Data Collection & Assessment*	Dean's Council				UPdate MSU					
	Ongoing Academic Assessment									
Initiatives			Math Student Success Coordinators		Center for Faculty Excellence					
Infrastructure	Math Learning Center		Writing Center							

*From the Dean's Council, Division of Student Success, Colleges, Academic Affairs, Faculty Senate, Assistant/Associate Dean's Council, University Graduate Council and the Office of Planning & Analysis

Dean's Council Created Math Learning Center

Writing Center Transformation

TEAL Classrooms completed

Honors College approved

New VP leads the Division of Student Success

Student Success and Advising Programs Updated

Kick-off Sophomore Surge

Figure 4.1: Core Theme 1 Learning Timeline

STANDARD 4.A – ASSESSMENT CORE THEME LEARNING

4.A.1 **The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.**

4.A.2 **The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.**

4.A.3 **The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.**

MSU engages in the systematic collection of data that informs planning, assessment and improvement to move MSU towards the objectives outlined for Core Theme Learning. Data collection and analyses are ongoing, systematic and meaningful and provide information to guide continued quality improvement of institutional programs and services. Institutional evaluation of effectiveness for Core Theme Learning is based on the performance indicators included as metrics in MSU's Strategic Plan. The Office of Planning and Analysis (OPA) collects and tracks these verifiable metrics (see Standard 1, Core Theme Learning Table) and presents them for discussion in monthly Planning Council meetings where members consider the appropriateness of indicators and of the strategic plan targets for Core Theme Learning. Institutional-level data on the learning performance

indicators are updated as new data are available and reviewed by University Council at least twice a year to track progress towards the Core Theme Learning objectives. Additional data to inform the decision-making process and evaluation of various strategies for Core Theme Learning are provided by OPA, colleges and academic departments and units, the Division of Student Success and by the units or divisions who initiate the strategies.

MSU's course, program and Core curriculum assessment process places the primary responsibility on faculty to clearly articulate learning goals and to plan, implement, and report an appropriate process for measuring how these goals are being met. The Office of the Provost's Program Assessment website has links to departmental assessment pages, which typically include program learning outcomes, assessment plans and annual assessment reports. These processes are introduced in the next several paragraphs and discussed in detail in the section below on academic program review and assessment.

Faculty have the primary role in the evaluation of educational programs and services through the development of course and program learning outcomes and assessment of the student learning outcomes for the courses they teach. Through the course proposal process, all courses have learning outcomes, a required part of course syllabi, listed on the Course Expected Learning Outcomes website. All academic programs are required to have an assessment plan developed by faculty in the option or program that clearly states the academic program learning outcomes and outlines a process for regular assessment of those student learning outcomes.

In addition to academic program assessment, academic program review provides valuable input into the planning and analysis processes at the university. The Board of Regents (BOR) requires a review of all degree programs every seven years. External program accreditation reviews satisfy the BOR requirement and those programs that do not undergo external accreditation are subject to MSU's academic program review process.

Core 2.0, MSU's general education curriculum, is developed and led by faculty who serve on the Core 2.0 Curriculum Committee and steering committees for Core 2.0 areas. The faculty members on steering committees approve new Core 2.0 courses in their areas and are charged with assessing their specific core subfield.

The Center for Faculty Excellence develops and provides educational experiences, opportunities, and resources that support the growth of all faculty (tenure and non-tenure track) across all career stages to achieve excellence in Core Themes Learning (teaching), Discovery (research and scholarship), Engagement (service and leadership) and the Integration of all three. The Center for Faculty Excellence offers workshops and resources to support faculty in teaching, including enhancing online instruction, developing learning outcomes, and creating inclusive classrooms. Assessments are conducted at the end of all workshops. The Teaching Excellence Action Committee, with faculty representatives from all colleges, provides input into the prioritization and content of workshops.

Extra- and co-curricular student programs that align with the Learning core theme also undergo annual evaluation, published in annual reports and distributed to relevant on- and off-campus constituents. Several MSU-initiated projects have been reviewed and adopted for other campuses by the Board of Regents, for example financial education and suicide prevention.

4.A.4 **The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.**

4.A.5 **The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.**

4.A.6 **The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.**

Existing programs and services, as well as initiatives being considered for implementation, are holistically aligned to accomplish core theme objectives. Requests for investments in new or existing Core Theme Learning initiatives must also propose how they will assess to what extent the programs and initiatives generate outcomes that contribute to the success of students, faculty, staff and the larger institution and will directly or indirectly contribute to Core Theme Learning objectives. To this end, MSU has made a concerted effort to support strategies – small and large – with one-time investments that become permanently funded when assessment shows that the program has been successful and can demonstrate its alignment to the strategic plan. The annual strategic plan reports (2012, 2013, 2014, 2015, 2016) highlight strategies, budget alignment, and successes for Core Theme Learning.

Assessment of programs and services directed to Core Theme Learning occurs at multiple levels (unit, program, department, college, and university). Strategic plan goal updates are produced at the university level by OPA and discussed in Planning Council (PC) meetings before they are presented to the University Council and broadly distributed through the PC webpage. Strategic planning and strategic plan objective prioritization are centralized in the PC, which reviews the goal updates in each core theme, collects data from relevant groups in order to analyze strategic plan core theme objectives holistically, and sets priorities to inform budgeting in the next fiscal year. In this way, the integration of programs and services with respect to accomplishment of core theme objectives is ensured.

The Assessment and Outcomes and Core 2.0 Curriculum Committees are taking an increasingly active role in assessing and improving academic assessment. Academic program assessment efforts are moving beyond the initial focus of getting departments and programs to design and implement assessment; these efforts have expanded to include encouraging authentic achievements and meaningful results that lead to continuous improvement.

STANDARD 4.B – IMPROVEMENT CORE THEME LEARNING

4.B.1 Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.

MSU identifies 10 meaningful indicators of achievement of progress towards MSU's three Core Theme Learning objectives. These indicators are used for improvement, to inform planning and decision making and direct the allocation of resources. These indicators and additional program specific indicators are used to improve specific strategies that support Learning. Data on these indicators are tracked by OPA, colleges and academic departments and units, the Division of Students Success, and other operating units that collect data to support and improve Core Theme Learning initiatives. University-level metrics are posted on the PC, OPA, and strategic plan webpages, and program-level assessments are published and appropriately distributed through posted assessment and/or annual reports.

4.B.2 The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.

Assessment of student learning is embedded in the activities of faculty and staff on campus through individual course assessments, program assessment, core 2.0 assessment, and math, writing and foreign language assessment. Assessment of student learning also is accomplished in successful collaborations between academic affairs and student success divisions that have identified, based on student performance, students who are at risk or courses that exhibit high rates of student failure or withdrawal. These efforts facilitate timely intervention that support student achievement. In these different venues, the data gathered from assessing student learning or student performance have resulted in changes in courses, curriculum, pedagogy, placement and advising strategies. The results of these various types of assessment of student learning are shared with appropriate constituencies such as departmental faculty, Faculty Senate, department heads, Associate and Assistant Deans Council, Dean's Council, the President's Executive Council and University Council through departmental faculty meetings, senate meetings, Department Head meetings and council meetings.

Core Theme 1 Learning: Examples of Strategies and Programs
The following examples describe in greater detail some of the strategies and programs that are focused on student learning, increasing graduation rates at MSU, and increasing job placement and further education rates. The strategies and programs focused on at-risk students are outlined in the "Access" section. The examples presented are strategies and programs that contribute positively to the Core Theme Learning objectives while recognizing student academic preparation as shown in Figure 4.2. Each example indicates the Core Theme Learning objective identifier(s) most closely associated with the strategy or program.
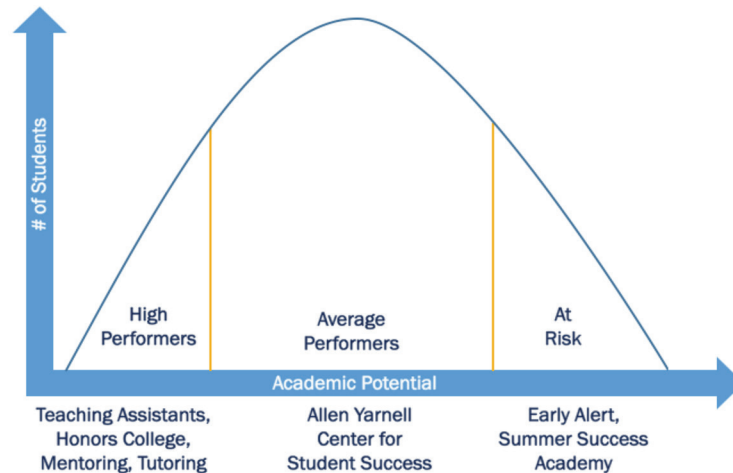
Figure 4.2: Student academic preparation

As a 21st century land-grant university, MSU defines itself as an institution that prepares its diverse student body to graduate equipped for careers and further education. However, the readiness or academic preparation of students varies based on multiple factors, with the majority falling in the middle of the curve (see Figure 4.2). High-performing students have the opportunity to apply for teaching assistantships, mentoring and tutoring positions, and to participate in the Honors College. The Division of Student Success, with the Allen Yarnell Center for Student Success (AYCSS), focuses on the average performing and at-risk students with an over-arching goal to provide access, support, solutions, and expertise that promote student retention and graduation outcomes.

Academic Program Review and Assessment at MSU (L1)

Consistent with Montana State University's mission, the institution employs systems for ensuring that programs have mission-appropriate content and rigor with clearly identified student learning outcomes. These systems include a substantive MSU academic program or external accreditation review, ongoing academic program assessment, CORE 2.0 assessment, and procedural systems for new course and program approval.

Academic program and external accreditation review

Montana State University has an established program review process that extends beyond the requirements of the Montana Board of Regents (BOR) policy 303.3 on Program Review. MSU program reviews are managed at the departmental level and include a review of all degree and certificate programs on a seven-year cycle. The purpose of broadening the reviews beyond the BOR requirements is to provide useful feedback to colleges and departments that might drive curriculum changes, provide assessments to inform resource needs, and potentially inform research or creative activities. This allows departments to take advantage of the expertise and perspective provided by internal and external reviewers. Departments are able to use the self-studies and review reports to inform departmental strategic planning as well as to help them develop hiring plans.

Guidelines for the program review are available on the Provost's Academic Program Review webpage. The program review process for academic programs requires that the program or department write a self-study report informed by comprehensive program data provided by the Office of Planning and Analysis and other university data collection and analysis tools such as Activity Insight and Academic Analytics. The Provost consults with the college deans to make decisions about whether internal or external reviewers will be used for the departmental reviews for each year. External reviews are conducted by a team of two or three disciplinary experts from other institutions, who may be assisted by an MSU faculty member from a closely related field. Internal reviews are conducted by a team of two or three MSU faculty selected from related fields. Often the review team is a combination of external and internal reviewers. Deans and Department Heads work with the Provost to identify appropriate reviewers. The evaluators produce a report in response to the self-study and a site visit. The Dean of the College then writes a response to the self-study and evaluator report. These documents are collected in the Provost's office and a summary report on all program reviews are presented to the BOR each fall.

As per BOR policy, academic programs are reviewed once every seven years and programs may use external accreditation reviews in lieu of separate reviews where appropriate. Professionally accredited programs are reviewed by external program-reviews in accordance with program-specific accrediting bodies.

Academic program learning outcomes assessment
At Montana State University, faculty have the primary role in the evaluation of educational programs and services through the development of course and program specific learning outcomes. Assessment of student learning is governed by the Student Outcomes Assessment Policy and the process is managed by the Office of the Provost and the Assessment and Outcomes Committee. The Office of the Provost hosts information on academic program assessment on its website.

Faculty within academic departments are responsible for developing, maintaining and reporting learning outcomes. A link to all degree and program learning outcomes, assessment plans and reports is included on the program expected learning outcomes webpage. Optional templates for program assessment plans and reports are also provided. Learning outcomes for existing courses were collected in 2012-13. They are now a required part of every new course proposal and course syllabus and are maintained in a repository on the Course Expected Learning Outcomes website on the Office of the Provost's academic assessment page.

Program assessment at MSU involves establishing program learning outcomes and assessing student performance for each outcome. Within programs, faculty members have flexibility in the design of their program assessment plans but have been asked to include program learning outcomes, threshold values, curriculum maps, and assessment schedules in their plans. Departments develop and maintain program learning outcomes and records of academic program assessment on their websites. A list of these websites can be found under program expected learning outcomes on the Provost's webpage. Departments also submit electronic program assessment reports for the prior academic year to the program assessment e-mail address by September 15.

Academic program assessment reports are due annually for undergraduate programs, in even-numbered years for Masters programs and in odd-numbered years for Doctoral programs. Optional templates for undergraduate assessment reports are provided on the academic program assessment page. Departments are asked to include a description of the learning outcomes assessed, the data collected, a brief description of what was learned from the data, and how the department responded to what was learned. This last piece allows faculty members to explain if they plan to implement any changes in response to the assessment.

MSU has long had a strong informal culture of academic program assessment, which is now formalized in institutional structures that support and encourage a formal academic assessment planning and reporting cycle. Departments are contributing by publishing academic program assessment documents on departmental websites. Additionally, samples of academic program assessment reports can be found in Appendix D.

For graduate programs, many departments use the graduate program assessment template created by the Office of the Provost in consultation with the Graduate School. This template was first developed in 2013 as a guideline to help departments develop assessment plans. Some graduate programs have longer histories of program assessment and have different plans, but all graduate program assessment plans are required to include program learning outcomes, identification of data sources for assessment, and a list of what the assessment reports will include. Graduate program assessment plans and reports are also available on department webpages and samples of graduate program assessment reports can be found in Appendix D.

MSU is part of a collaborative Ph.D. program with the University of Montana and Montana Tech in Materials Science. The Ph.D. program involves multiple departments, faculty, courses, and research infrastructure and was approved by the Office of the Commissioner of Higher Education (OCHE) in May 2013. A business plan was developed to delineate the mission and goals of the program and to outline how the academic program would be assessed. The business plan and the 2017 External Advisory Board Report on the program are available in Appendix E.

The Office of the Provost has tracked the current and recent work in assessment. Table 4.2 indicates the progress that has been made in moving towards 100 percent participation in academic program assessment.

Table 4.2: Academic Program Assessment Participation

Program Type	Assessment Plans	AY12-13 Reports	AY13-14 Reports	AY14-15 Reports	AY15-16 Reports	AY16-17 Reports*
2-year	100%	NA	0%	67%	82%	100%
Bachelors	95%	52%	52%	46%	60%	60%
Masters	100%	15%	25%	19%	48%	15%
Doctoral	100%	0%	8%	17%	30%	30%

*Reports for AY16-17 are not due to the Provost Office until September 15, 2017 and so current participation may be higher than documented here. An updated version of this table will be available before the October 2017 NWCCU visit.

The Assessment and Outcomes Committee will next review academic program assessment plans and reports in fall 2017, following the September 15, 1017 due date. Implementing a standardized review process with a focus on authentic assessment of program learning outcomes and meaningful results will lead to the improvement of academic programs.

Core 2.0 learning outcomes assessment (general education assessment)
Core 2.0, Montana State University's general education program for undergraduate students, was developed by faculty and implemented in 2004. Core 2.0 is required for all undergraduate students to help them reach their intellectual potential, become contributing members of society, and compete more successfully in a rapidly changing and increasingly complex world.

Faculty at MSU believe that students should broaden their cultural horizons by contact with the creative arts, sciences and the humanities, and achieve an understanding of the political, social, economic and ethical problems of the contemporary world and the relation of their studies to these problems.

To this end, the Core 2.0 curriculum ensures a wide-ranging general education of consistent and high quality to all Montana State University students regardless of their major or area of study. Core courses allow students to reaffirm their common experiences, redefine their common goals, and confront their common problems. Core 2.0 courses emphasize communication and techniques of creative inquiry in a variety of disciplines.

Core 2.0 curriculum at Montana State University is designed to enhance students' intellectual experience in all realms of academia, with the express goal of providing students with a broad exposure to and knowledge of multiple and varied methods of scholarship. The Core curriculum consists of required classes that focus on clear verbal and written expression(s) of critical analysis and evaluation of academic fields of study at the heart of human intellectual and artistic inquiry and achievement. Completion of the Core 2.0 curriculum requirements will introduce students to the theories, methods, and foundations of these academic fields, enable them to critically evaluate information in these subjects, and teach them to present their knowledge clearly in both verbal and written form.

Core 2.0 requirements (27-30 credits) are built on five Foundation Cores (University Seminar, College Writing, Quantitative Reasoning, Diversity, and Contemporary Issues in Science), and Inquiry Core in Arts, Humanities, Natural Sciences and Social Sciences and a Research & Creative Experience Core.

Core 2.0 is required for all baccalaureate degrees and for the Associate of Arts and Associate of Science degrees. Also, all 30 credit certificates at Gallatin College contain a recognizable core general education with identified outcomes in the areas of communication (writing), computation (mathematics), and human relations (professional communications) that align with and support program goals or intended outcomes.

Core 2.0, is developed and led by faculty who serve on the Core 2.0 Curriculum Committee and seven steering committees for the Core areas. The faculty on steering committees approve new Core 2.0 courses in their areas and are charged with assessing their specific core subfield.

The Core 2.0 curriculum committee provides faculty leadership for the core curriculum as a whole and a forum for discussion of issues that impact all elements of the core. Each of the five Foundation Cores and the Inquiry and Research & Creative Experience Cores have faculty led steering committees that are charged with supporting that particular Core area and evaluating new Core 2.0 course proposals to determine which courses should be approved for inclusion in the core, based on content and learning outcomes. The steering committees also clarify goals and recommend policies to address concerns that may arise in their courses, manage the assessment of all courses and make recommendations to the Core 2.0 Curriculum Committee.

Included among the UPdate MSU committees was the UPdate Core/General Education committee. This group was tasked with assessing the Core 2.0 curriculum and making recommendations for updating or reinventing the MSU general education curriculum. The UPdate Core committee reviewed data on student satisfaction with Core 2.0, sought input from some Core 2.0 steering committees and encouraged faculty input at open meetings where the work of UPdate Core was presented to the university community in an open forum. The UPdate Core final report was submitted in June 2016, after the recommendations had been presented at various venues across campus during spring 2016. The primary recommendation was to implement a new Core as outlined in the final report, which also outlined the resources needed for such an implementation. The recommended resources included a full-time Core Director and a half-time assessment specialist. Consideration of these recommendations to revise the core curriculum remains a work in progress as the need for additional investment and personnel are fully reviewed.

Beginning in 2010, Learning outcomes for Core 2.0 were updated by the steering committees in each of the Core areas to use direct outcomes and to ensure that the learning outcomes were assessable and consistent. In 2013 at the time of MSU's NWCCU Mid-Cycle Report, two of the seven Core 2.0 areas had assessment plans and were engaged in annual assessment and continuous improvement practices. Currently five Core 2.0 areas have developed assessment plans and standardized processes of annual assessment and continuous improvement. Assessment plans and reports for these five core areas are available in Appendix D.

By the September 15, 2017 submission deadline, all Core 2.0 areas are expected to have assessment plans and will be prepared to begin participating in annual assessment (see Table 4.3). The University Seminar, Quantitative Reasoning and Writing core areas have a strong record of assessment that has informed instruction and the assessment process. The Core 2.0 curriculum committee has discussed the difficulty of assessing some of the Core 2.0 areas and identified a major obstacle to be the distribution of core courses in a wide variety of different colleges and departments. The committee has recommended to academic affairs that the logistics of data collection be managed by academic affairs staff so that the Core 2.0 committees could focus their efforts on the actual assessment of the Core 2.0 areas. Academic affairs will consider whether an existing program manager is able to take on this role in AY2017-18.

Table 4.3: Core 2.0 Assessment Activities

Core Area	Assessment Plan	Assessment Reporting
University Seminar	Yes	Since 2013-14
College Writing	Yes	Since 2014-15
Quantitative Reasoning	Yes	Since 2012-13
Diversity	Yes	Since 2015-16
Contemporary Issues in Science	Yes	First cycle 2017-18
Inquiry	Yes	First cycle 2017-18
Research & Creative Experience	Yes	Since 2016-17

New course and program approval

MSU uses a course inventory management (CIM) system for new and revised course and program approvals to ensure that the process is consistent. Curriculum development, which includes both new courses and programs, is initiated by faculty and departments and programs, with multiple levels of input and consideration. This process includes the curriculum committees at the department and college levels, the appropriate Dean, the University Curriculum and Program Committee (CPC) or the University Graduate Council (UGC), Faculty Senate, Deans' Council, and the Provost, with final review by the Board of Regents or the Commissioner of Higher Education when acting as its designee.

The campus review process outlined above involves the review steps illustrated in "Proposing a New Course" and "Proposing a New Program". Within this process faculty are involved in the design and proposal of new courses and programs. Faculty also comprise the majority of membership on the department curriculum committees, the college curriculum committees, the Curriculum and Programs Committee (the University-level curriculum committee) and the Faculty Senate. This review process was built into the workflow process of the Curriculum Inventory Management software introduced in 2014.

The CIM system embeds all the required steps, and detailed instructional materials for using the system are available to all departments. Pursuant to Montana BOR Policy 303.10, Montana State University submits to the BOR an Academic Program Planning list, which is posted on the BOR Academic Program Planning site. The MSU academic program plan contains all programs that the campus may submit to the BOR for its consideration in the next three years. Departments may add ideas to this local MSU Academic Pre-Plan list at any time, and then items on the Pre-Plan list are considered for inclusion on the Academic Program Planning list, which is sent forward to the BOR each Spring.

As outlined in the BOR Academic Affairs Procedural Guidebook, "Level I items are those requests for which the BOR has designated approval authority to the institution or the Office of the Commissioner of Higher Education (OCHE)," and "Level II proposals require approval of the BOR." After all MSU internal approvals have been obtained through CIM, Level I and Level II curricular changes are submitted to the OCHE and Montana BOR for notification, or approval, and then to the Northwest Commission on Colleges and Universities (NWCCU) if required.

Honors College (L1,2&3)

The Honors College provides opportunities for students to study, conduct research, and exchange ideas in a challenging and supportive interdisciplinary academic environment. The Honors Program was established in 1964, eliminated in 1972 due to budget shortfalls and reinstated in 1981. In September 2013, the Board of Regents approved the designation of an Honors College at Montana State University replacing the Honors Program. Honors students can attend special Honors seminars, take interdisciplinary Honors courses, and engage in independent study and research opportunities.

Table 4.4: Honors enrollment and completion of Honors graduation requirements

	AY2010	AY2017	Change
Enrollment	801	1,332	+ 66%
Graduating with Honors	51	139	+172%

Since 2009, enrollment in the Honors College has increased by 66% and the size of the Honors graduating classes by 172% (see Table 4.4). In fall of 2009, the Honors Program offered 16 sections of HONR 201 Texts and Critics and six upper level Honors seminars. Every year since, the college has increased course offerings to meet student demand. In the fall of 2016, the college offered 25 sections of HONR 201 Texts and Critics and 15 upper level Honors seminars. Honors students may elect to complete the requirements for their Honors degree, which is indicated on their academic transcript and noted in the University Commencement program.

The Honors College is also the home of major scholarship advising and has contributed to a surge in the numbers of MSU students who have won and are competitive for national and international scholarships. This is an area of tremendous achievement for the university and for the Honors College. Since 2009, three MSU Students were named Rhodes Scholars and 21 students were named Goldwater Scholars. This is in addition to two Gates-Cambridge Scholars, a Marshall Scholar, 31 National Science Foundation (NSF) Graduate Research Fellowships, a Schwarzman Scholar, three Truman Scholars, six Udall Scholars, and 14 Fulbright Scholars. Of particular note, MSU now has 68 Goldwater Scholars: 10th in the nation in terms of number of awards, above Yale and tied with Johns Hopkins University.

Honors courses and seminars have been regularly evaluated and assessed. The University Seminar Core Assessment committee has also assessed HONR 201 US compared to the other US seminar courses. The results of these assessments have been shared with the Texts and Critics Advisory Council and the Dean, and strategies have been implemented to address areas where improvements were indicated. The Texts and Critics Advisory Council has met for the past eight years, to evaluate, assess and design the syllabi for HONR 201 and 202 anew each summer. Input from students and faculty are also considered in the process. As a result, student satisfaction with this sequence of courses is very high.

The College also tracks graduation and retention rates, as well as graduate success beyond MSU, in terms of admittance to graduate schools, fellowship and scholarship recipients, and career success. Honors College program managers have administered course evaluations, both at the mid- and end of term, as well as exit interviews and surveys upon graduation.

Allen Yarnell Center for Student Success (L1,2&3)

The Allen Yarnell Center for Student Success (AYCSS) guides students on their path to discovery and self-knowledge by providing individualized learning experiences; broadening their engagement with the university; encouraging exploration within their chosen disciplines; and challenging them to be lifelong learners as they pursue academic, professional, and personal excellence. AYCSS is comprised of several offices and services supporting more than 18,000 client visits during the 2016 – 17 academic year. The AYCSS encompasses the following offices and services:

- Office of Student Success (including SmartyCats, Early Alert Program)
- Office of Financial Education
- Career, Internship & Student Employment
- Return-2-Learn
- Data Collection, Analytics, Marketing and Communication (including ChampChange)
- Focused Access & Excellence Initiatives, including the Hilleman Scholars Program (see Core Theme Access for more information)
- Descriptive data by academic year in Table 4.5 demonstrates the delivery and adoption of AYCSS services and programs.

Table 4.5: AYCSS Services and Student Use for selected programs (as of May 2, 2017, source AYCSS)

AYCSS Service	Student Usage and Implementation Year	AY 17	Change
SmartyCats Tutoring hours	6,872 AY12	14,714	+114%
Student Success Advising Appts	621 AY12	2,348	+278%
Career Coaching	1,084 AY13	1,451	+34%
Return-to-Learn Appts	52 AY14	488	+838%
ChampChange Engagements	128,762 AY12	595,187	+362%
Early Alert Referrals (distinct students)	1,962 AY15	2,231	+14%
Financial Coaching Appts	322 AY14	1,013	+215%

Generally, these descriptive data correlate to improvements with MSU's First-Time Full-Time student (FTFT) retention rates. For instance, in 2007, the FTFT retention rate for the incoming class was 71.5%; this number has improved to 75.9% for the 2015 FTFT class (with a peak in 2014 at 76.9%). This improvement reflects the efforts and programs of several campus initiatives including the work of the AYCSS.

The AYCSS is committed to connecting individual student outcomes to better institutional outcomes by focusing on continuous improvement using an iterative assessment and improvement process that considers:
- the problem - *how do we retain and graduate more students?*, and
- the environment – *how do we do this work in a constantly evolving environment?*

To answer these questions, the AYCSS has instituted several initiatives to both better understand the problem at hand, and how to better define and adapt to the environment, identifying where changes are needed. Examples of this work, include but are not limited to:
- **Actively identifying and supporting students who are least likely to graduate.** To improve both institutional and individual student outcomes, the Center has mined historical data from previous incoming classes to inform how to identify and target the support for students from current incoming classes. This descriptive and predictive information is helping shape both the operational methods (e.g. communication tactics, data collection methods, learning support efforts, etc.) and strategic investments in programs.
- **Reporting by all AYCSS program managers to understand program weekly metrics compared to prior week, semester, and yearly efforts.** In a continuous improvement focused environment, understanding base-line data for "where we have been" combined with the intention of closing gaps helps define a roadmap forward. Improved programs and services create higher levels of satisfaction and use of services.
- **Working to improve program efforts beyond the metrics.** The Center actively searches, and where appropriate, incorporates national best practices, while also working to develop its own through regular program review. The staff members also regularly consider the Beginning College Survey of Student Engagement and ChampChange engagement data to understand the habits and hopes of students and how they interact with their environment at MSU.

Gallatin College (L1&3)

MSU is located in Gallatin County. Gallatin Valley residents first experienced the benefits of professional and continuing workforce education in 1996, with courses offered by MSU-Great Falls College of Technology (COT). These courses were limited but met short-term workforce training needs for the community and were offered downtown in a City of Bozeman facility.

In 2004, at the request of the MSU President, MSU-Great Falls COT set up an extension operation and began providing developmental education coursework to serve primarily students seeking MSU Bachelor degrees. The small faculty and staff established an office and academic development center on the outskirts of the MSU campus and began offering developmental math in 2004 and developmental writing and college studies courses in 2005. Over time, applied academic programs leading to Associate of Applied Science degrees or Certificates of Applied Science were added: A.A.S. in Aviation in 2005, C.A.S. in Welding and A.A.S. in Interior Design in 2007, and an A.A.S. in Design Drafting in 2009.

The more permanent need for the development and expansion of two-year education has been well established in Gallatin County and (adjoining) Park County. Data relating to the existing needs for two-year education shows up in the 2006 Environmental Scanning Report conducted by the MSU Great Falls COT Extension in Bozeman, in the MSU May 2010 Board of Regents Two-Year

Education Transition Proposal, and in the 2011 Local Workforce Development Survey conducted by Gallatin College.

In 2010 increasing student enrollments and community interest called for a more local organizational structure. In May 2010, the Montana Board of Regents approved an MSU Bozeman proposal to offer Certificate and Associate Degrees and two-year education services. In May 2011, the BOR approved the first Comprehensive Two-Year Education Mission and Vision for the Montana University System. The mission was developed through an inclusive process that included input from a variety of two-year education stakeholders around the state. The comprehensive mission is as follows:

> *"The Mission of two-year education in Montana is to provide a comprehensive, accessible, responsive, student-centered learning environment that facilitates and supports the achievement of individuals' professional and personal goals, and enhances the development of Montana's citizens, communities and economy."*

This mission set the foundation for the development of Gallatin College as the local two-year college in this part of the state. The Comprehensive Two-Year Education Vision Statement is also well suited for Gallatin College. It states:

> *"Montana's two-year education: Transform lives and create opportunities through educating the citizens of the state of Montana."*

The Comprehensive Two-year Education Mission and Vision goes on to identify key purposes, attributes and core values for the Two-Year Mission. Gallatin College strongly supports open access, affordability, responsiveness to local needs, rigor, relevance and the rest of the identified purposes, attributes and values.

As of fall 2016, the college enrollment (headcount) had grown to 474 degree seeking students and 887 developmental education students. These students were served by 17 full-time tenure-track faculty, 40 adjunct faculty and eight staff members. The 2016-17 annual full-time equivalent (FTE) students count is just over 519, while the FTE for fall 2016 was 575. The College has surpassed its projections, and the growth pattern of the college has clearly moved beyond the start-up phase of development.

UPdate Scholarship Administration (L1)
Unmet student financial need is one of the key drivers of student attrition, and it is a critical factor in a low income, high need state like Montana. The Update MSU - Scholarship Administration working group began meeting in November 2014. The group's goal was to improve the campus' capacity to match, track, and communicate awards by identifying appropriate scholarship management software and aligning processes in support of optimized scholarship fund usage, efficient scholarship administration and enhanced donor relations. Improvement in these areas is critical to mitigating the impact of unmet student financial need, one of the performance indicators for Core Theme Access.

In response to the recommendations, the Division of Student Success worked with an external consultant to substantially reorganize and upgrade the Office of Financial Aid Services including upgraded classified job descriptions, training schedules, and salary levels; updated and improved communication cycles; and realigned roles for improved customer service. Financial Aid staff members also worked closely with the MSU Foundation to create a timeline and campus-wide business process calendar that clarifies the awards process for both offices, generating a more successful and efficient awards process. With the support of the President's office, a new executive position was created to lead the Financial Aid office in the design and direction of its next chapter of improved student and stakeholder services.

UPdate Advising/Sophomore Surge (L2)
While the campus has made progress in moving toward its graduation and retention goals, the UPdate Advising working group observed, "too few students are progressing through the *progression pipeline*" and improving advising could help support student success.

In order to address this situation, the UPdate Advising working group reviewed and evaluated current advising practices and structures and made five recommendations for improving advising and related student support on the MSU campus:
- Clarify the Roles of Advisors Within a "Unit" Framework;
- Improve Advising Support Infrastructure, Processes and Expectations Associated with First Year Major Choice;
- Employ Greater and More Consistent Use of Information Technology and Assessment;
- Foster Student Self-Direction and Progression for Both On-Path and Off-Path Students; and,
- Establish a Campus Advising Action Team or CAAT - Comprised of Faculty, Staff, and Administrators.

In response to these recommendations, the Campus Advising Action Team (CAAT) was formed and with the support of the offices of the Provost and President, it has designed the Sophomore Surge (see below), a peer mentoring and relational advising initiative to positively influence first to second year retention and help MSU achieve its goal to achieve an 80 percent retention rate by 2019. CAAT is also implementing other recommendations of the UPdating Advising workgroup.

The Sophomore Surge, a new program being implemented at MSU in fall 2017, will have peer mentors, faculty, and staff who guide and support incoming students throughout their first year of college and engage them with an active community of support. Developed based on analysis of past and current programs, gaps, data and research, the purpose is to leverage existing tools and resources and provide individually tailored support for the social, academic, and personal needs of first-year students throughout the crucial first year of college. The Surge supports first-year students in their transition to college through exploration, examination, and development of their identity, interests, strengths, values, and goals. The Sophomore Surge will connect first-year students with a Peer Mentor and with faculty and advising professionals at MSU who are committed to student success. The program will combine student support with a state-of-the-art engagement and developmental curriculum designed to "surge" students into their sophomore year.

The Surge will assign teams of 15-17 first-year students to a one credit class facilitated by a Peer Mentor and overseen by a professional Surge Coordinator who will involve students in a combination of curricular and co-curricular engagement activities, and maintain a personal academic and social relationship with each participant. This program will integrate students into a community of learning to assist and guide students to design and pursue a signature educational experience for themselves. More specifically, it is an educational experience that blends curricular and co-curricular opportunities to enable students to craft and pursue a path to a degree and post-graduation life that meaningfully develops and aligns their strengths, values, and goals with their learning choices both inside and outside the classroom.

Strategies to Support Math Learning at MSU (L1)
In the last five years, MSU's Department of Mathematical Sciences has found a formula for success for teaching math and statistics to MSU undergraduates by implementing a learning strategy that hinges as much on personal interaction as math concepts. Every MSU student must take a quantitative reasoning course to complete Core 2.0 requirements. The department integrated three strategies in support of math learning at MSU: Instituting Student Success Coordinators, TEAL classroom instruction (see spotlights), and the Math Learning Center.
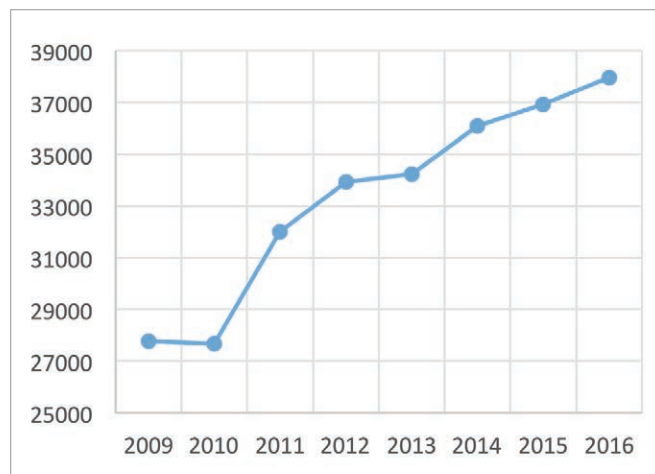

Figure 4.3: Student Credit Hours in Mathematical Sciences

These strategies are important because of the large number of courses taught by the department. Figure 4.3 shows the rapid growth in the number of student credit hours over time. In 2015-16, there were 215 unique sections of Quantitative Reasoning (Q) core courses in Mathematics or Statistics. Across all courses, the department taught 37,974 student credit hours in 2015-16. This number has increased steadily since 2010.

Student success coordinators (SSC)
In FY 2012-13, the Department of Mathematical Sciences applied for and was awarded a Strategic Investment Proposal to redesign and restructure delivery of four of the largest courses (STAT 216, M 121, M 171 and M 172). Figure 4.4 shows the current student success rates (success is defined as students earning a C or better) compared to a three-year average of the pre-SSC student success rates in those same courses.
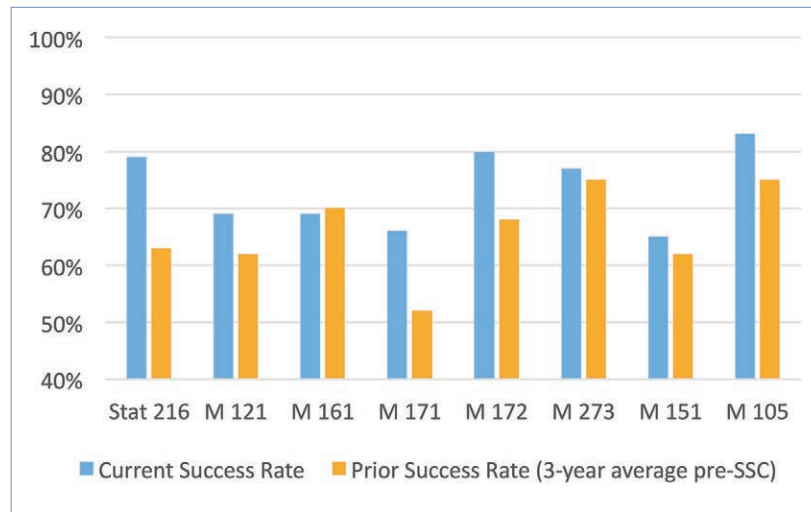
Figure 4.4: Student Success Rates Before and After Implementation of Student Success Coordinators

The core of this redesign was to hire a Student Success Coordinator (SSC) for each class. In 2013-14 the SSCs began to work with Tenure Track Faculty course supervisors to implement strategies aimed at student learning, such as:

- *Instructor mentoring* –weekly meetings with all instructors to discuss course material and grading assessments; multiple instructor observations with feedback and recommendations; lecture guides and examples for all sections covered;
- *Identifying and targeting "at-risk", underprepared students* –prerequisite diagnostics to administer early in the semester, with additional homework to help strengthen missing math skills; study groups for at-risk students throughout the semester;
- *Student support* – exam review sessions, online homework sets, in-house and external instructional videos for students; review worksheets and solutions for exams; and,
- *Data collection* – track performance for all students on exams, homework and section grades; conduct survey of resources each semester to evaluate the effectiveness of individual resources and provide a platform for student comments.

The Department of Mathematical Sciences offers eight courses, as shown in table 4.6, with very high enrollment. These courses account for the vast majority of the quantitative reasoning courses, Q courses, in Core 2.0.

Table 4.6: 2016-2017 Mathematical Science Course enrollments

Course	Sections (enrollment)	Course	Sections (enrollment)
Stat 216	44 (1,537)	M 172	26 (883)
M 121	32 (1,155)	M 273	21 (769)
M 161	30 (1,074)	M 151	19 (620)
M 171	28 (1,103)	M 105	19* (530)

*Two co-requisite courses in partnership with Gallatin College

Prior to fall 2013, these courses were offered in sections of 40-45 students taught independently by a Graduate Teaching Assistant or a non-Tenure Track faculty member and supervised by a tenure track faculty member. Under that instructional model, these courses had low pass rates (for example, only 52% of M171 students and only 62% of Stat 216 students earned a C or better in the course).

After the implementation of the SSC program, there was a statistically significant increase in the student success rate. In response to the success from the first year's implementation of the SSC program, the department applied for and received additional Strategic Investment Proposal funding to hire SSCs for four additional high enrollment courses (M 161, M 273, M 151, M 105).

The university has responded by investing base funding into the program. The department assesses the effectiveness of the SSC program annually, and continues to refine the specific roles and duties of the SSCs.

Mathematics learning center
The Department of Mathematical Sciences supports tutoring across its lower division courses using the course program fee-funded Math Learning Center (MLC). Tutors are undergraduate students, graduate teaching assistants, non-tenure track (NTT) faculty and tenure-track faculty who teach lower division courses. The center is run by two NTT faculty co-directors. The department received Performance Funding for the MLC in 2016-17 to implement additional training for tutors and directors.

MLC use has continued to increase (see Figure 4.5), with the total number of students increasing, total number of hours increasing, and average use per student also increasing. Recent analysis documents that at-risk students who are frequent users of the MLC are almost twice as likely to be successful in their math or statistics class as infrequent users (45% success rate for frequent users vs. 26% success rate for infrequent users).
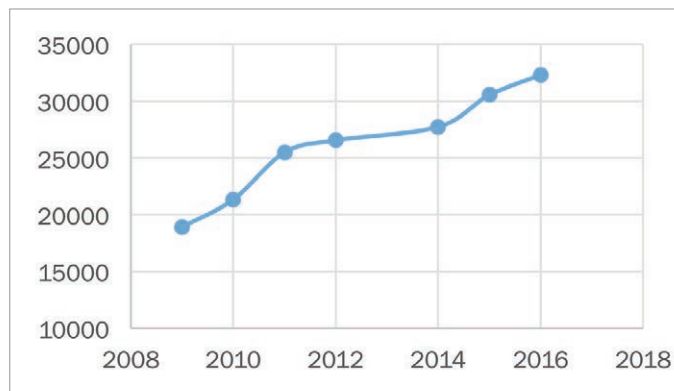

Figure 4.5: Total Hours of Use of the Math Learning Center

MSU Writing Center (L1)

A Strategic Investment Proposal Grant in 2012 launched significant improvements to the MSU Writing Center, positively impacting student writing skills. The first improvement was the staffing of the center, upgrading the Director to a full-time, tenure-track faculty member from the Department of English who oversees 20 peer tutors. Previously, the center was staffed by an adjunct faculty member paid the equivalent of one course per semester, aided primarily by GTAs.

The strategic investment also funded a renovation of the center, moving the facility from a small tutoring room to a space designed with best practices of one-on-one tutoring in mind. The Center offers tutoring in a space in the main library, as well as in the South Hedges residence hall, a freshman dorm. Additionally, the Center launched online tutoring for distance learners, as well as classroom presentations, writing groups, and other models for writing support.

In addition to partnerships across the university, the center has also reached out across the Bozeman and Greater Montana Community. The center has partnered with the Bozeman High School and Belgrade High School Writing Centers. This led to MSU undergraduate tutors co-presenting with high school tutors from Belgrade High School at the Rocky Mountain Writing Center Association Peer Tutor Conference. MSU hosted 20 writing center administrators from all over the state, including tribal colleges, high schools, private universities, and state universities as a part of a Montana Writing Center day, an event the center plans to continue.

Student contacts at the MSU Writing Center have increased by more than 84% from FY12 to FY17 (see Figure 4.6), through one-on-one peer tutoring, course partnerships, class presentations and writing groups. The Writing Center assesses effectiveness in supporting learning at MSU through online surveys. Since 2012, students submitting a survey have consistently expressed between 98-99% satisfaction.
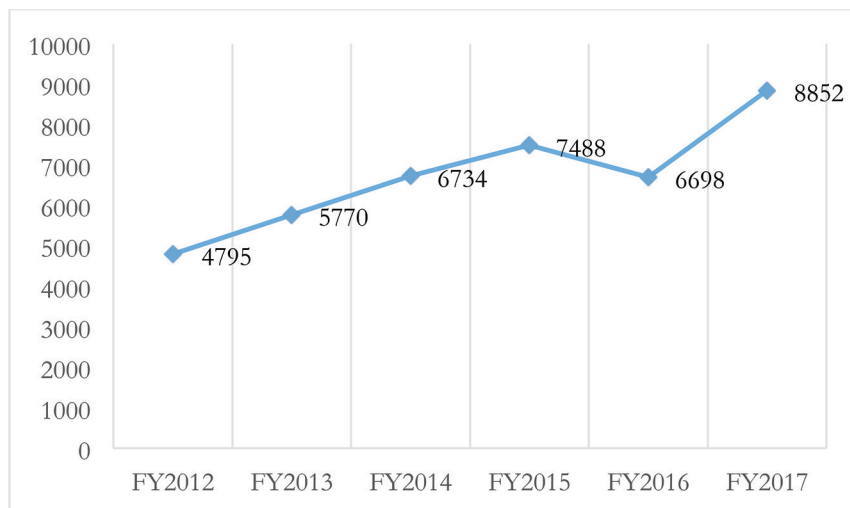

Figure 4.6: MSU Writing Center Student Contact by Fiscal Year

A sampling of comments taken from more than 2000 student comments submitted from August 2016 through April 2017, underscores the value of the Writing Center in providing students a rich learning experience through support both inside and outside of the classroom.

- "One of the best supporting programs at MSU for the student, especially for the non-native English speaker, like me."
- "I am very satisfied with the help I received. I now know the few revisions that I need to make and the appointment gave me confidence in my paper."
- "The best help I've received in my academic career when it comes to writing."
- "I was encouraged to think on my own and draw my own conclusions. It was a very helpful session. The tutor was great!!"

Additional funding support provided by the university in FY2017 resulted in much-needed technology upgrades. The center has added computers and internet connections that will allow increased online tutoring in FY2018.

Spotlights

Classrooms that Support Active Learning (L1)
Technology-Enhanced Active Learning (TEAL) style of teaching encourages students to teach each other and solve problems in a collaborative way. In 2013, the Mathematical Science Department began to use TEAL approaches in M 121 (College Algebra), Stat 216 (Introduction to Statistics), and M 132-133-234 (Mathematics for K-8 Teachers). These approaches involve curriculum adjustments so that courses are student-centered with problem sets comprising the bulk of material addressed in class. These courses are taught in classrooms that enable students to work in groups and share their group work with the entire class.

Writing Center as Educational Environment for the Students Who Serve as Peer Tutors (L1)
MSU's commitment to the peer tutor program underscores its commitment to learning within and beyond the classroom through a hands-on student-centered curriculum. Peer tutors have become the foundation of the MSU Writing Center. Undergraduate peer tutors provide support to students as peers rather than professionals. These tutors undergo rigorous training and education, including weekly workshops, co-mentoring, observations, and independent research. In addition, peer tutors gain professional and academic experience as they learn to work with writers and learn hands-on about writing within a variety of contexts.

Instructional Designer for Faculty Professional Development (L1)
In April 2016, MSU hired an Instructional Designer in the Center for Faculty Excellence to enhance the pedagogical skills of faculty to support student learning. The Instructional Designer works with faculty in groups and one-on-one to provide information and guidance about best practice teaching methods for face-to-face, online, and hybrid course design. Training has been delivered in a variety of formats including workshops, short courses, consultations, and faculty learning communities.

Student Mental Health Services (L1)

MSU strives to provide a welcoming, inclusive, and affirming environment that reflects the institution's appreciation for human diversity. MSU works to create an environment of mutual respect and understanding among people of diverse racial, ethnic, religious, spiritual, and national backgrounds. This also includes various identities regarding sexual orientation, gender, gender identity, mental and physical ability, language, age, socioeconomic status and other diverse backgrounds and cultures. Many programs address this goal including:

- The Counseling & Psychological Services Center that helps students in crisis or distress, as well as providing services to those who wish to prevent their concerns from developing into more serious problems;
- The VOICE Center that helps students who have experienced violence and emphasizes empowerment of the survivor and peer-based services provided by staff and trained advocates;
- Safe Zone training that promotes an inviting and inclusive environment that is emotionally and physically safe for LGBTQIQ (lesbian, gay, bisexual, transgender, queer, intersex, questioning) students, faculty, and staff; and
- Suicide prevention as a major focus on the MSU campus.

Suicide is the 2nd leading cause of death among college students nationwide, and there almost 1,100 suicides at U.S. college campuses each year. MSU has a team of psychologists, counselors, faculty, staff, and student leaders working to protect the MSU community from the devastating impact of suicide. The Counseling & Psychological Services Center provides support and resources around suicide prevention.

In February 2016, MSU was host to the Montana University System Suicide Prevention Summit. Organized by the Montana University System Suicide Prevention Task Force, the inaugural summit attracted more than 300 educators, students and mental health professionals from throughout the state, including every Montana college and university. The subjects covered included Social Media, research in mental health, and Question, Persuade, Refer Training for faculty. The goal of this summit and these services is to protect the MSU community from the impact of suicide and enhance the learning environment on campus.

CORE THEME 2: DISCOVERY

Description:	Innovative and significant research and creative activities distinguish the 21st century university and are a recognized hallmark of MSU, where faculty, students and staff all participate in the creation of knowledge and art.
Goal Discovery (D):	MSU will raise its national and international prominence in research, creativity, innovation and scholarly achievement, and thereby fortify the university's standing as one of the nation's leading public research universities.
Objectives:	D.1: Elevate the research excellence and recognition of MSU faculty. D.2: Enhance infrastructure in support of research, discovery and creative activities. D.3: Expand the scale, breadth and quality of doctoral education.

MSU's standing as a research institution is earned by the talented faculty, students, and staff who create knowledge and art, apply new insights to critical issues, and communicate the impacts of their discoveries throughout the world. These discoveries advance the state of the art, provide concrete improvements to daily life, enhance undergraduate and graduate education, drive economic development, and contribute to a thriving community. MSU is deeply committed to its reputation as a research and creative force so that the best scholars choose MSU to study, work, and address the tough problems of tomorrow. Sustaining this prominence requires continuing to recruit, retain, and recognize talented faculty, students, and staff, maintaining the appropriate research and graduate education infrastructure, and training the next generation of scholars and artists, particularly at the doctoral level.

In 2015, the Carnegie Ranking system changed, placing Montana State University in the "higher research activity" category, the middle of three basic Carnegie classifications for doctoral universities. MSU was one of 16 research universities that were reclassified from the highest category to the middle category for doctoral universities in 2015 when the classification system was updated. This change in classification has provided an opportunity for MSU to reflect on its research enterprise and graduate education. Analyses have revealed that an influential factor in the change was an increased emphasis in the classification system on the numbers and types of doctoral degrees conferred. Over time, doctoral degrees conferred at MSU vary from year to year. In the three most recent years not reflected in the 2015 Carnegie Classification, the number of doctoral degrees awarded is above that in earlier years. This will contribute positively to future rankings. MSU maintains its strategic plan commitment to improve its rank among Carnegie Classified Research Universities.

The cornerstone of assessment, decision-making, and improvement for each core theme is MSU's Mission and the objectives outlined in the strategic plan. The development, provision of support, and assessment of strategies for Core Theme Discovery are all undertaken with consideration of how the implementation of new programs and changes in existing programs related to discovery might overlap or impact planning and implementation in the other core theme areas.

The assessment and improvement for discovery is overseen by the highest administrative levels (University Council and the President) and governed by the collaborative process described in Standard 3. The Office of Research and Economic Development (RED), the Graduate School,

Colleges and Departments collaborate to assess and improve research and graduate education across campus. The leaders in assessment for discovery are Research Council, RED, the University Graduate Council and the Graduate School, who evaluate data, assessments, recommendations, and observations from departments, programs and units around campus.

An example of external assessment is illustrated by the awards and recognitions that MSU has received in the area of Discovery (see below for more details). In 2016, MSU was successful in earning the Innovation and Economic Prosperity (IEP) designation from the Association of Public and Land-Grant Universities (APLU), which recognizes institutions for their integration of talent (education), innovation (research and discovery) and place (engagement efforts) to improve the state and the world.

The discovery timeline below (see Figure 4.7) provides a sample of the assessment and improvement process for Core Theme Discovery with examples of strategies and programs that are mentioned in this section. The text that follows provides a description and evidence to illustrate how MSU meets the standards for assessment and improvement. First, Standards 4A and 4B are addressed; second, evidence to support those standards are offered in the form of examples that outline the assessment, planning and improvement process as it operates for selected programs in discovery; and third, featured spotlights documenting MSU's commitment to research and graduate education are provided.
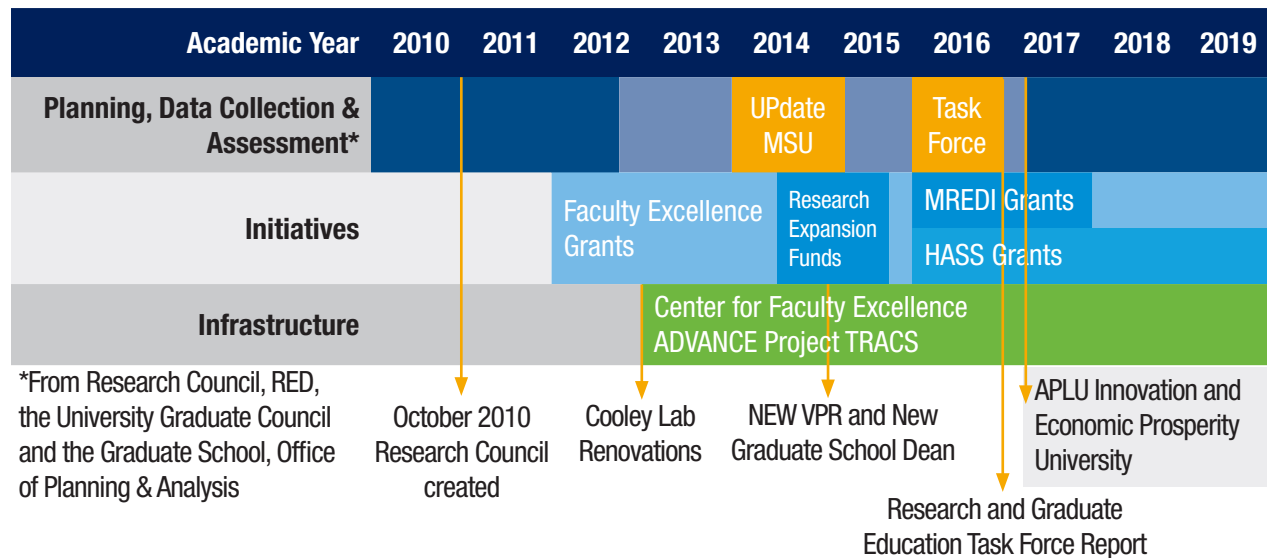

Figure 4.7: Core Theme 2 Discovery Timeline

STANDARD 4.A – ASSESSMENT

4.A.1 **The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.**

4.A.2 **The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.**

4.A.3 **The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.**

MSU engages in systematic and meaningful collection of data that informs planning, assessment and improvement to move MSU towards the objectives outlined for Core Theme Discovery. Data collection and analyses are ongoing, systematic and meaningful and provide information to guide continued quality improvement of institutional programs and services. Institutional evaluation of effectiveness for Core Theme Discovery is based on the verifiable performance indicators included as metrics in MSU's strategic plan, which the Office of Planning and Analysis (OPA)and the Office of Research and Economic Development (RED) collect, track, and regularly present, to the Planning, Research and University Councils (See Standard 1, Core Theme Discovery table). These data are also presented in monthly Planning Council meetings where members consider the appropriateness of indicators and of the strategic plan targets for Core Theme Discovery. Institutional-level data on the discovery performance indicators are updated as new data are available and reviewed by University Council at least twice a year to track progress towards the discovery objectives. Additional data to inform the decision-making process and evaluation of various strategies for Core Theme Discovery are also provided by colleges and academic departments and units, and the Graduate School, as well as by the units or divisions who initiate the strategies.

4.A.4 **The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.**

4.A.5 **The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.**

4.A.6 **The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.**

Existing programs and services, as well as initiatives being considered for implementation, are holistically aligned to accomplish core theme objectives. Requests for investments in new or existing research or graduate programs must also propose how they will assess the extent to which the programs and initiatives generate outcomes that contribute to the success of students, faculty,

staff and the larger institution and will directly or indirectly contribute to Core Theme Discovery objectives. There has been a concerted effort to support strategies, small and large, with one-time investments that can become permanently funded if assessment shows that the program has been successful (and can demonstrate its alignment to the strategic plan). The annual strategic plan reports (2012, 2013, 2014, 2015, 2016) highlight strategies, budget alignment, and successes for Core Theme Discovery.

Assessment of programs and services directed at Core Theme Discovery occurs at multiple levels (unit, program, department, college, and university). However, strategic plan goal updates are produced by OPA and discussed in PC meetings before they are presented to the University Council and broadly distributed through the PC webpage. Strategic planning and strategic plan objective prioritization are centralized in the PC, which reviews the goal updates in each core theme, collects data from relevant groups in order to analyze strategic plan core theme objectives holistically, and sets priorities to inform budgeting in the next fiscal year. In this way, the integration of programs and services with respect to accomplishment of core theme objectives is ensured.

STANDARD 4.B – IMPROVEMENT CORE THEME DISCOVERY

4.B.1 Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.

MSU identifies 17 meaningful indicators of achievement of progress towards MSU's three Core Theme Discovery objectives. These indicators are used for improvement, to inform planning and decision making, and to direct the allocation of resources. These indicators and additional program specific indicators are used to improve the specific strategies (detailed below) that support Core Theme Discovery. Data on verifiable indicators are tracked by OPA and the office of Research and Economic Development (RED). Individual units or divisions who initiate strategies and collect assessment data to support, improve, or refine initiatives that support core them discovery may also work with OPA or RED to identify verifiable data for assessment purposes. University-level metrics are posted on the PC, OPA, and Strategic Plan webpages.

4.B.2 The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.

Assessment of graduate student learning resides in expected venues around campus through individual course assessments, program assessment, and cumulative independent research and creative projects, as well as through projects taken on by task forces on graduate education, the University Graduate Council, and the Graduate School. In these different venues, the data gathered from assessing student learning or student performance have resulted in changes in graduate courses, curriculum, pedagogy, and placement strategies, as well as informing new student recruitment and

advising strategies. The results of these various types of assessment of student learning are shared with appropriate constituencies such as departmental faculty, Faculty Senate, department heads, University Graduate Council, the Graduate School, the Research Council, Dean's Council and University Council.

Core Theme 2 Discovery: Example of Strategies and Programs

The following examples describe in greater detail some of the strategies and programs that are focused on Core Theme Discovery objectives. Each example indicates the Core Theme Discovery objective(s) most closely associated with the strategy or program.

Research Infrastructure Grants (D1 and D2)
MSU leads research efforts in the state under umbrella organizations such as the National Institutes of Health's (NIH) Idea Networks of Biomedical Research Excellence (INBRE) and Centers of Biomedical Research Excellence (COBRE), co-leads the NSF's Established Program to Stimulate Competitive Research (EPSCoR) grant, and receives other infrastructure grants. A subset of infrastructure grants is listed below. These grants require systematic and cyclic planning, proposing, collaboration and assessment for their continued success and renewal.

Table 4.7: A Subset of Infrastructure Grants Awarded to MSU

Infrastructure Grant	Years	Funding
MT NSF EPSCoR*	37 yrs	$40.5M
NASA NSF EPSCoR*+	25 yrs	$17.3M
NIH INBRE	15 yrs	$44.5M
MSU NSF EPSCoR Track II	6 yrs	$10.6M
NIH COBRE Center for American Indian and Rural Health Equity	5 yrs	$23.3M
NIH COBRE Health Equity in Rural Montana	5 yrs	$10.5M
NIH COBRE Infectious Diseases	5 yrs	$4.3M
American Indian-Alaska Native Clinical and Translational Research Program (AI-AN CTRC)	5 yrs	$20.3M

*Includes match funding
+Includes funding for research infrastructure since 2001 and research group support since 2007

Montana NSF EPSCoR – MT NSF EPSCoR is a Montana University System (MUS) program focused on stimulating sustainable improvements in Montana's research and development (R&D) capacity and competitiveness in science and engineering research. MSU EPSCoR Projects include:

- Sustainable socio-economic, ecological, and technological scenarios for achieving global climate stabilization through negative CO_2 emission policies; and,
- Montana Institute on Ecosystems (IoE) - The Montana IoE was established with a $20 million EPSCoR grant to the Montana University System. It is a community of scholars and partners with a shared vision of advancing integrated environmental sciences and related fields.

NASA NSF EPSCoR

Since 1992, Montana NASA NSF EPSCoR has been a part of the national NASA EPSCoR designed to establish partnerships with government, higher education and industry to effect lasting improvements in Montana's research infrastructure, R&D capacity and hence, its national R&D competitiveness. The program has support in three categories: Research Infrastructure Development, Research Group Awards, and International Space Station Research Awards.

NIH INBRE

The Montana INBRE is a collaborative network of Montana-based universities, colleges, including tribal colleges, and research institutions that invests in the state's biomedical research capacity and workforce pipeline. INBRE is an IDeA Program grant. Montana is one of 23 states and Puerto Rico participating in the National Institute of General Medical Sciences (NIGMS) Institutional Development Award (IDeA) Program. The IDeA Program seeks to increase the competitiveness of investigators by supporting faculty development and research infrastructure at institutions where success rates for NIH grant applications has historically been low. The IDeA program also aims to serve unique populations such as rural and medically underserved communities.

Montana NIH COBRE is awarded by the National Institutes of Health, Institute of General Medical Sciences (NIGMS). COBRE grants support thematic, multidisciplinary centers that augment and strengthen institutional biomedical research capacity. They provide funding for expanding and developing biomedical faculty research capability and enhancing research infrastructure, including the establishment of core facilities needed to carry out the objectives of a multidisciplinary, collaborative program. Visit the links to MSU centers below to learn more:

- Center for Health Equity in Rural Montana;
- Center for Zoonotic and Emerging infectious Diseases; and,
- Center for American Indian and Rural Health Equity.

American Indian-Alaska Native Clinical and Translational Research Program (AI-AN CTRC)

The AI-AN CTRC is developing the capacity of several Montana and Alaska academic institutions to address health disparities that Native communities in these states face. This 5-year, $20 million grant from NIGMS includes collaborators from Blackfeet Community College, the University of Montana, the University of Alaska Fairbanks, the University of Alaska Anchorage, Alaska Native Tribal Health Consortium and the Southcentral Foundation. The new program functions as a conduit for shared resources, joint training opportunities and interdisciplinary research collaborations, and is organized under four areas of emphasis, including community engagement, professional development, pilot projects and research design.

Task Force on Strengthening Research and Scholarly Work (SRSW) (D1)

The Strengthening Research and Scholarly Work Task Force was an ad hoc group formed in 2016 to explore challenges and identify opportunities to advance research and scholarly work at MSU. The charge to the group was to:

- Analyze current research and scholarly work (submissions, awards, expenditures, book and refereed journal publication, citations, patents) at MSU;
- Provide comparison of research and scholarly work at peer institutions (classification, size, budget); and,
- Study and recommend policy proposals for consideration of faculty retention, promotion and tenure cases.

One challenge identified by the SRSW task force was the narrow focus on a few measures of research output. The group saw an opportunity to use additional measures that are critical to providing a more comprehensive understanding of research and scholarly work at MSU. For example, the current measures are based largely on a subset of inputs, namely external funding tracked by the Office of Research and Economic Development (RED) (as shown in Table 4.8), excluding important sources of funding such as gifts directed toward research, investment from the State of Montana and the U.S. Department of Agriculture for the MT Agricultural Experiment Stations.

Table 4.8: Research expenditures and numbers of funded proposals

Year	Expenditures (RED-managed)	New Proposals Funded
2012	$112.3M	454
2013	$93.8M	452
2014	$90.5M	450
2015	$87.8M	540
2016	$94.2M	600
2017	Pending but currently exceeding 2016 by 6-8% (to exceed $97.5M)	Expected to equal or exceed 2016 by 1-2%

The task force acknowledged that MSU has additional tools to measure productivity such as Activity Insight (internal faculty activity reporting) and *Academic Analytics* (peer comparisons by discipline). The task force determined that there is potential to use these tools for assessment and improvement in the future.

One recommendation to emerge from the task force was to assemble and assess measures of success (attainment of target goals) at the department level and report these measures to the RED in departmental annual reports as a form of data collection and celebration of annual research and scholarly accomplishments. This will help at multiple levels including providing RED with more detailed data on what departments are doing in research and scholarly activity and achieving a better understanding of how different disciplines measure success. It will also help departments think more comprehensively about how they measure success in research and scholarly activity so they are better able to assess progress towards departmental goals and objectives. The first round of department and college research annual reports were completed and turned in to RED in spring 2017.

A second recommendation was to develop a *peer institution list* that can be adopted to assess productivity. Discussions are underway to determine an inclusive process for developing such a list. A third recommendation was to support more opportunities for celebrating research and scholarly accomplishments at MSU. In response to this recommendation, RED introduced the MSU Publications email that shares the research and scholarly publications produced by faculty. In March 2017, the RED also coordinated the very well attended community event "10X10 MSU Innovation Road Show: From Tiny Houses to Honey Bees" to celebrate and share the breadth and quality of Research at MSU with the Bozeman community.

Task Force on Improving Graduate Student Admissions and Degree Completion (D3)
The task force on improving graduate student admissions and degree completion was formed in 2016 and focused on the following tasks:
- Analyze current departmental admission processes and standards;
- Propose strategies and tactics to improve graduate student admissions and retention; and,
- Accelerate graduate degree progress, with an emphasis on the completion of doctoral degrees.

Looking at the overall institution, the number of doctoral degrees awarded annually per faculty member at MSU and the lowest top-tier institution in the highest Carnegie research class are 0.12 and 0.08, respectively; however, the average value for top-tier institutions is much higher, 0.29. Thus, compared to top-tier institutions, MSU has not reached full capacity to award doctoral degrees. Furthermore, the total number of graduate students per faculty member at MSU and the lowest top-tier institution are 3.7 and 2.0, respectively; however, the average value for top-tier institutions is 6.4. So, compared to those institutions, MSU has not reached full capacity to enroll graduate students. When compared to a set of land-grant peer institutions (5 of which are top-tier as well), the same trend is observed.

It was acknowledged that the MSU faculty may have a greater involvement in undergraduate education and particularly in providing more opportunities for undergraduate students to do research than their peers. To assess this possibility, the number of undergraduates enrolled per faculty member was calculated. The MSU ratio was 29 and the average top-tier ratio was 17. However, no correlation (r=0.007, P = 0.983) was found between undergraduate enrollment per faculty number and number of doctoral degrees awarded. So undergraduate enrollment does not seem to explain the lower number of doctoral degrees awarded at MSU.

In addition, the task force prepared a questionnaire with 75 questions and distributed it to department heads. There were three parts to the survey: recruitment practices, degree program practices, and strategic targets. Thirty-one (31 of 32) departments responded (96.8%) with nine of these MS-only programs and three BS/BA-only programs. Additionally, two graduate programs (1-MS and 1-PhD) without designated departments submitted a completed survey. Analyses of the responses were used to guide recommendations for improvement.

The top recommendations of the task force were almost all focused on building capacity and pathways to degree completion for students.

- *Recruitment* - Encourage departments to establish graduate recruitment and admissions committees in every department and encourage them to participate in the annual recruitment weekend, organized by the Graduate School (GS), to foster a graduate student community across campus. Work with departments to take advantage of tools for identifying and contacting potential students such as the GRE database, funding agencies, and international institutions.
- *Admissions* – Prioritize Graduate Teaching Assistant (GTA) lines and tuition credit waivers to departments with significant growth in their undergraduate student credit hours and number of doctoral students. Strive to achieve a better match between number of graduate students admitted and estimated program capacity.
- *Retention and Completion* – Manage time-to-degree completion and GTA stipends for full time graduate students. Require milestones and timelines for transition points on a program of study.
- *Building Community* – Establish a designation for faculty members who mentor graduate students to create a support network and recognition for their contributions. On-board doctoral students as a cohort with students then moving through the programs at roughly the same time.
- *Incentives* - Provide financial support such as recruitment travel costs, multi-year fellowships, signing bonuses, and other programs.

Many of these recommendations have been implemented (see examples below) and some are in progress.

Recruitment

Even before the Task Force was convened, the GS review of data indicated the need to improve recruitment. In response, the School hired a central recruiter who started in February 2015. One of the recommendations of the Task Force was to expand and better fund the Graduate Recruitment Weekend (GRW). During the visit, prospective students have an opportunity to meet current graduate students; interact with faculty and research staff; attend a 3-minute thesis competition, program-specific poster session, and/or symposium; and tour the campus and labs. Some graduate students tour the region and community with faculty and students.

Over the last three years, GRW has grown from 42 visiting prospective students to 86, with an increase in participating programs as well. Travel costs were covered by the GS and the Office of the Provost. Funding for on-campus activities was provided by the departments and colleges. The data show that prospective graduate students who participated in recruitment weekend have been more likely to choose MSU to carry out their graduate studies. This has led to an increase in graduate enrollments, supporting metrics in D3 as well as in Learning and Access.

Retention and Completion

The Graduate School began a pilot in FY2017 to centralize graduate tuition waivers, with an expected impact on encouraging steady academic progress and timely degree completion through strategic allocation. To date, the GS with the assistance of the College of Engineering staff successfully centralized the tuition waiver distribution for the College's five departments. For FY2018, a pilot is underway to centralize the tuition waiver distribution for the College of Letters & Science (13 departments). As colleges are on-boarded to the process, MSU will continue to measure time to degree, credits to degree, and the number of graduates.

Program of study

As a practice, Master's students submit completed Program of Study (PoS) at the end of their 2nd term and doctoral students submit the PoS at the end of their 3rd term. Consistency varies across departments and colleges. The Task Force recommended that the PoS be modified to provide milestone estimates (e.g., comprehensive exam, qualifying/candidacy exam, defense date, graduation date). With commonly understood progression in the degree program (the student, research chair, and department head signature appears on the PoS), the student has clear expectations and therefore is motivated to complete the program. In addition, the research chair and department are accountable and expected to provide the necessary advising and support for students to be able to complete their degree. The GS will assess this improvement by monitoring the number of students who adhered to the PoS plan and time to degree, with the goal of increasing the number of graduates as well as shortening the time to degree in support of D3 performance indicators. The PoS also underpins learning outcomes definitions and assessment on an individual level.

Montana Research & Economic Development Initiative (MREDI) (D2&3)

In 2015, the State of Montana approved a budget that included direct investment of $15M over two years for university-based research that also included collaborators and private institutions. This was the first-ever research initiative investment at the state level. The MSU community responded with more than 130 letters of interest (LOIs) that resulted in distribution of $8.9M of the total $15M of funding in the first year. The fundamental purpose of this research initiative was to: (1) solve Montana problems with Montana solutions; (2) create good Montana private-sector jobs; and/or, (3) grow emerging and important research sectors that contribute to the diversity of Montana's economy. MSU's proposals not only enhance Core Theme Discovery but also address objectives in Learning, Engagement and Integration. Below are two examples of projects resulting from this program.

The MSU College of Agriculture and Montana Agricultural Experiment Station received $2.3 million for a research project to replace 3.38 million acres of Montana land currently left fallow with pulse or cover crop mixes using laser optics for pinpoint precision agriculture. Project objectives included: improve income from lands previously fallowed; develop new, improved, or quality differentiated products or crops; and, develop on-farm precision agriculture tools and technologies. Initial data analysis generated statewide indicates a projected increased gross income for rural Montana of $90 million if 25% of previously fallow land is cropped to cover crop mixes, $101 million if cropped to peas, and $253 million if cropped to lentils. Precision agriculture technologies have proven to increase profitability by 25–30%. Additionally, these new optics-based technologies have been demonstrated to reduce herbicide use by >30%. This MREDI project also employed 17 undergraduate and graduate student assistants.

The Center for Mental Health Research and Recovery received $1.5 million from MREDI for research to ensure that Montanans with mental illness can get the right diagnosis, as early as possible, and receive the most appropriate preventive and treatment interventions. Montana has the highest suicide rate in the country, and currently more than 18,000 Montanans live with Alzheimer's. Mental health conditions such as major depression, bipolar disorder, schizophrenia, Alzheimer's, chronic pain, PTSD, and substance abuse can be better addressed through research that clarifies the underlying neuroscience of the conditions and that tests emerging interventions to meet our mental health challenges. The objectives of the project were to: develop a brain function analysis tool

that improves speed and accuracy of clinical diagnostic process for anxiety and depressive disorder; conduct a study on the use of Deep TMS (Transcranial Magnetic Stimulation) for treatment of Alzheimer's; collaborate with SiteOne Therapeutics to develop non-opioid treatment for chronic pain; and, adapt a European-developed suicide prevention intervention program to implement in rural high schools in Montana (Youth Aware of Mental Health — YAM).

The Center for Mental Health Research and Recovery (CMHRR), in collaboration with the YAM originators and University of Texas Southwestern, is testing YAM for the first time in the US. The collaborative team is currently evaluating the feasibility and acceptability of delivering YAM to approximately 2,000 students from eight schools in Montana and five schools in Texas, and secondarily assessing its efficacy for mental health resiliency and other mental health outcomes when adapted to the US. In addition, the team established a research infrastructure at the Western Montana Mental Health Center in Butte where the new neuropsychiatric treatment technology, Transcranial magnetic stimulation (TMS), is now available for the first time in southwestern Montana. The project employed five undergraduate student assistants.

ADVANCE Project TRACS (D2 and D2)
In 2012, the university received $3.5 million in NSF funding to support "ADVANCE Project TRACS" *Empirically Investigating Transformation through Relatedness, Autonomy, and Competence Support.* Project TRACS has focused on transforming the academic culture to cultivate the recruitment, retention, and advancement of STEM women faculty, and in the end, foster excellence in all faculty, through three initiatives. The Work-Life Integration initiative generates new programs, such as a family advocate and dual career assistance program, and builds on existing programs such as providing more flexible solutions for work-life integration through modified duties and stopping the promotion and tenure clock policies. The Cultural Attunement initiative promotes respectful communication, sensitivity to the dynamics of relationships within a particular culture, and respect for the values and beliefs of cultures through a "Broadening the Faculty Search" toolkit, an equity advocate program, and by engaging the university community in implicit bias education. Finally, the Enhancing Research Capacity and Opportunity initiative institutionalizes systematic research support for women faculty in STEM fields through hiring a Grant Submission Training Coordinator who leads grant proposal writing workshops, provides individual proposal assistance, and connects new grant seekers to a mentoring network of successful grantees. In addition, a Research Capacity and Opportunity Advisory Team made up of representative from STEM departments was formed to advise the position.

During the five years of Project TRACS, 79 faculty from 30 different departments and centers participated in one of five Grant-Writing Bootcamps. An assessment revealed that participating in the Grant-Writing Bootcamp significantly increased the number of external grants submitted, the number of proposals led as Principal Investigator (PI), the number of external grants awarded, and the amount of external funding dollars awarded compared to a matched group that did not attend the Bootcamp. Therefore, in 2016, the Grant Training Coordinator position and the Grant-Writing Bootcamp were incorporated into the Center for Faculty Excellence, along with the Research Capacity Advisory Team (see spotlight).

Spotlights

APLU Designated MSU as an Innovation and Economic Prosperity University (D1)
The Association of Public and Land-Grant Universities (APLU) recognizes that land-grant universities strive to integrate talent (education), innovation (research and discovery) and place (engagement efforts) to improve their states and the world. Through a competitive review process, APLU designates [Innovation and Economic Prosperity](#) (IEP) universities that have shown that integration is a strength. MSU was successful in gaining the IEP designation in 2016. Also, the APLU recognized MSU with the "talent" award, specifically for three areas of institutional strength in economic engagement: for the university's efforts to develop the photonics and optics industry in the Gallatin Valley, for a host of programs that illustrate MSU's dedication to serving Native American populations, and for the university's efforts to advance entrepreneurship.

Internal Funding Programs for Research, Discovery and Creative activities (D2)
In May of 2014, $200,000 in Research Expansion Funds were awarded to competitive proposals with the goal of jumpstarting new research programs with high probability of generating additional external funding. More than 170 proposals were submitted with 300 faculty members in interdisciplinary teams receiving funding for these two-year projects. In 2016, recognizing the need to increase support for scholarship in the Humanities, Arts and Social Sciences (HASS), MSU initiated a new funding mechanism (HASS grants) providing $200,000 per year for proposals from these disciplines. Seventy-six faculty members submitted 16 proposals for two types of grants: Phase I - one-year pilot projects; and, Phase II - three-year developed projects. The Faculty Excellence Grants (FEG) program began in AY 2011-12 with the goal of enabling faculty to engage in activities that will enhance scholarship with a maximum of $5000 grant. Since the program's launch, 178 grants have been awarded in six years. During AY 2016-17, twenty-eight faculty received grants totaling $121,500.

[Center for Faculty Excellence (CFE)](#) (D1)
The mission of the Center is to develop and provide experiences, opportunities, and resources that support the growth of all faculty (tenure- and non-tenure track) across all career stages in achieving excellence in Core Themes Learning (teaching), Discovery (research and scholarship), Engagement (service and leadership) and the Integration of all three. The CFE Research Capacity Advisory Team, started with the ADVANCE grant, is now made up of representatives from all colleges and the Office of Sponsored Programs. The team gathers feedback and gives input to the workshops, Grant-Writing Bootcamp, seminars, discussion groups, mentoring opportunities, and grants offered by the Center to support professional development. The Center's [Early Career Faculty Mentoring Program](#) expanded in 2011 to include research mentoring in addition to teaching. The objectives of the Mentoring Relationship are to provide ideas and serve as a sounding board for all areas of faculty life, introduce new faculty to the culture, and provide help with the transition to life at MSU.

ScholarWorks Institutional Repository (scholarworks.montana.edu) (D2)
Nearly all research libraries manage digital repositories of faculty intellectual output. These institutional repositories are designed to provide perpetual open access to faculty publications, presentations, posters, and other research products promoting dissemination of institutional research. The Dean of the MSU Library has been an innovator in institutional repository research. His team developed strategies that all libraries can follow to encourage discovery of institutional repository content through search engines like Google Scholar, and he is currently leading a project to improve analytics and metrics for institutional repositories.

Research Centers (D2)

MSU has more than 40 centers, institutes and programs that focus on research and some are detailed below.

- The Center for Western Lands and Peoples focuses on the natures and cultures of the western United States and Canada. Highlighting interdisciplinary research and teaching, the Center engages faculty and students in a variety of fields, including American studies, English, film and photography, geography, history, archaeology, and Native American studies. Together, they explore the meaning of place as expressed in a variety of texts and material objects.

- The Center for American Indian and Rural Health Equity (CAIRHE) is supported by a five-year Centers of Biomedical Research Excellence (COBRE) award by the National Institutes of Health, Institute of General Medical Sciences (grant number 5P20GM104417-02). The long-term goal of CAIRHE is to reduce significant health disparities in Montana's tribal and rural communities through community-based participatory research that is considerate of and consistent with their cultural beliefs.

- The Montana Engineering Education Research Center's (EERC) mission is to transform engineering education through collaborative, empirical research. It strives to position Montana as a national leader in engineering education research and enable faculty to tackle the big research questions in engineering education with the ultimate goal of improving student success and contributing to the training of tomorrow's professoriate.

- The American Indian/Alaska Native Clinical & Translational Research Program is a joint partnership funded in cooperation with NIH to explore health disparities in native communities in Alaska and Montana and includes collaborators from Blackfeet Community College, the University of Montana, the University of Alaska Fairbanks, the University of Alaska Anchorage, Alaska Native Tribal Health Consortium and the Southcentral Foundation. Montana and Alaska are similar in that both states have large Native populations and both face disproportionately high rates of Native health disparities.

- The Center for Interdisciplinary Health Workforce Studies' mission is to improve the capacity of the nursing and larger health care workforces to provide healthcare that is safe, effective, efficient, accessible, equitable, and timely. The Center brings together individuals and organizations, policymakers, nursing leaders, researchers and other stakeholders to address problems facing the nursing workforce. The Center conducts research on important problems facing the nursing and larger health workforce to inform policy makers, employers, nurses, and various stakeholders.

- The Center for Health and Safety Culture is an interdisciplinary center serving communities and organizations through research, training, and support services to cultivate healthy and safe cultures. The Center is dedicated to applying research to develop sustainable solutions to complex social problems. Its Positive Culture Framework (PCF) provides a process to guide researchers, practitioners, and community leaders to improve health and safety.

- The Extreme Gravity Institute strives to further the understanding of astrophysics and fundamental physics through extreme gravity phenomena. The merger of black holes and neutron stars, isolated and binary pulsars, cosmology in the early universe, and the accretion disk of supermassive black holes are examples of phenomena at the frontiers of science, where the potential for new discovery is unfathomable. The research at the eXtreme Gravity Institute focuses on relativistic astrophysics, gravitational theory, general relativity and data analysis.

CORE THEME 3: ENGAGEMENT	
Description:	Engagement is the collaboration between MSU and its local, state, national, and global communities for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. Engagement, a form of scholarship that bridges teaching, research and service, brings the university's intellectual resources to bear on societal needs.
Goal Engagement (E):	Members of the MSU community will be leaders, scholars and engaged citizens of their local, national and global communities, working together with community partners to exchange and apply knowledge and resources to improve the human prospect.
Objectives:	E.1: Strategically increase service, outreach and engagement at MSU. E.2: MSU graduates will have global and multicultural understanding and experiences. E.3: MSU students, faculty and staff will have increased opportunities for leadership development.

As a land-grant institution, members of the MSU community aspire to engage in diverse ways across many communities. MSU has a strong foundation of engagement with the local community, Montana, the nation and, indeed, the world.

MSU faculty, staff, and students actively participate in service and outreach with MSU's Extension as a model for interaction with the community. An important emphasis in Core Theme Engagement is the reciprocity that can emerge for the benefit of both the community and MSU through collaborative activities and information sharing. With this emphasis, MSU renews its land-grant commitment: increasing opportunities for and participation in service, outreach, and engagement by all MSU community members, fostering cultural attunement to better understand and engage diverse communities here in Montana and around the world, and creating focused leadership development.

The cornerstone of assessment, decision-making, and improvement for each core theme is MSU's Mission and the objectives outlined in the strategic plan. Assessment and improvement for engagement are overseen by the highest administrative levels (University Council and the President) and governed by the collaborative process described in Standard 3. Engagement is part of the DNA of MSU. The Outreach and Engagement Council and the Office of Student Engagement institutionalize the university's commitment to engagement and integration. Since the Council's establishment in 2012, strong leadership and coordinated opportunities for seed funding are available to support engagement efforts. Similarly, the Office of Student Engagement has provided students with a place where they can find opportunities to engage with many different communities. The leaders in assessment for engagement are the Outreach and Engagement Council, Department Heads, Deans and the Colleges; in cooperation with the Office of Planning an Analysis (OPA), they evaluate data and review assessments, recommendations, and observations from faculty, departments, programs and units around campus.

External assessment of MSU engagement activities is demonstrated by the awards and recognitions that MSU has received. In 2011, MSU received the Carnegie Foundation's community engagement classification, and the APLU's C. Peter Magrath University Community Engagement Award. In 2016, MSU received designation from the APLU as an Innovation and Economic Prosperity (IEP) university, recognizing MSU's economic engagement with its state, followed by the Talent award for IEP universities, recognizing partnerships with local, state and tribal communities to develop human and social capital. All four recognitions required extensive self-study and assessment, active planning processes, and external review.

The Core Theme Engagement timeline (Figure 4.8) below provides a sample overview of the assessment and improvement process for Core Theme Engagement and the narrative that follows provides a description and evidence to illustrate how MSU meets the standards for assessment and improvement. First, Standards 4A and B are addressed; second, evidence to support those standards are offered in the form of examples that outline the assessment, planning and improvement process as it operates for engagement; and third, featured spotlights further document MSU's commitment to engagement. These activities and processes make it easier for faculty and staff to identify engagement opportunities and move MSU towards its objectives for engagement.
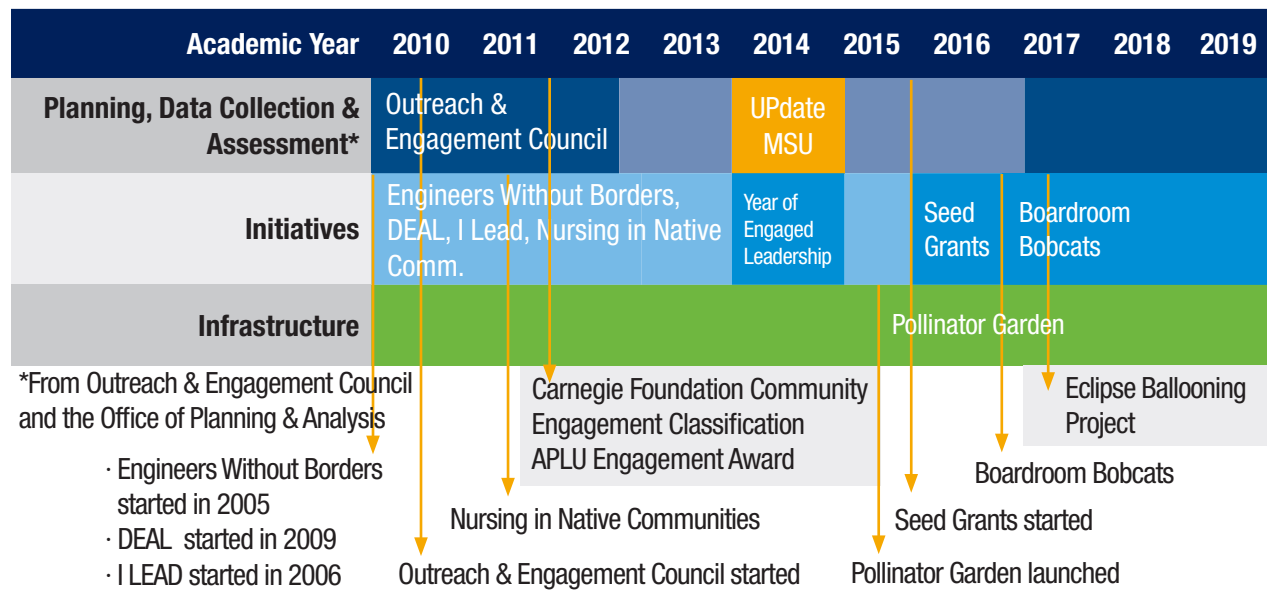
Academic Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Planning, Data Collection & Assessment*	Outreach & Engagement Council				UPdate MSU					
Initiatives	Engineers Without Borders, DEAL, I Lead, Nursing in Native Comm.				Year of Engaged Leadership		Seed Grants	Boardroom Bobcats		
Infrastructure							Pollinator Garden			

*From Outreach & Engagement Council and the Office of Planning & Analysis

· Engineers Without Borders started in 2005
· DEAL started in 2009
· I LEAD started in 2006

Nursing in Native Communities

Outreach & Engagement Council started

Carnegie Foundation Community Engagement Classification APLU Engagement Award

Seed Grants started

Pollinator Garden launched

Boardroom Bobcats

Eclipse Ballooning Project

Figure 4.8: Core Theme 3 Engagement Timeline

STANDARD 4.A – ASSESSMENT CORE THEME ENGAGEMENT

4.A.1 **The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.**

4.A.2 **The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.**

4.A.3 **The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.**

MSU engages in systematic and meaningful collection of data that informs planning, assessment and improvement to move MSU towards the objectives outlined for Core Theme Engagement. Data collection and analyses are ongoing, systematic and meaningful and provide information to guide continued quality improvement of institutional programs and services. Institutional evaluation of effectiveness for Core Theme Engagement is based on the performance indicators included as metrics in MSU's Strategic Plan. The Office of Planning and Analysis (OPA) collects and tracks these verifiable metrics (see Standard 1, Core Theme Engagement Table). These data are also presented in monthly Planning Council meetings where members consider the appropriateness of indicators and of the strategic plan targets for Core Theme Engagement. Additional data to inform the decision-making process and support assessment and improvement of Core Theme Engagement programs are provided by OPA, Office of Student Engagement, colleges and academic departments and units, and program leaders who initiate the strategies. OPA assesses verifiable data collected to support, improve, or refine the strategic plan.

In 2010, after MSU was awarded the Carnegie Classification for Community Engagement, MSU established an Outreach and Engagement Council to strategically champion engagement at MSU. In support of MSU's land-grant mission, the Council exists to advance the understanding and practice of service, outreach, and engagement in fulfilling strategic plan goals, and it supports faculty, staff and students as they commit to this important work. The Council is comprised of 18 members serving two-year terms. Members are recommended by each Vice President to represent their units and also includes other campus entities directly responsible for outreach functions, such as the Museum of the Rockies, Extension and the Alumni Foundation.

Soon after its launch, the Council created a position paper on Outreach and Engagement that was presented to MSU University Council in 2011, refined, and posted in 2013. The purpose of the position paper was to create common definitions for terms used in MSU work, including service, service learning, outreach and engagement. It also describes best practices and APLU standards for what it means to be an engaged individual, department, and institution.

On an annual basis the Council reviews nominations and recommends individuals for the Provost's Outreach Award given annually to two individuals, one faculty member and one staff member, at spring convocation. The Council also prepares and submits a nomination each year for the APLU Peter Magrath Community Engagement Award. Over the past six years MSU has received first place, second place, and honorable mention for this prestigious national award. The Outreach & Engagement Council chair serves as MSU's representative to the national Engagement Scholarship Consortium (ESC), and Council members (including students) have attended and made presentations at several ESC annual conferences.

4.A.4 **The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.**

4.A.5 **The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.**

4.A.6 **The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.**

Existing programs and services are holistically aligned to accomplish core theme objectives. Requests for investments in new or existing engagement initiatives must propose how they will assess the extent to which the programs and initiatives generate outcomes that contribute to the success of students, faculty, staff and the larger institution and will directly or indirectly contribute to Core Theme Engagement objectives. There has been a concerted effort to support strategies, small and large, with one-time investments that can become permanently funded if assessment shows that the program has been successful and has demonstrated its alignment to the strategic plan. The annual strategic plan reports (2012, 2013, 2014, 2015, 2016) highlight strategies, budget alignment, and successes for Core Theme Engagement.

Assessment of programs and services directed at Core Theme Engagement occurs at multiple levels (unit, program, department, college, and university). Strategic plan goal updates are produced by the Office of Planning and Analysis (OPA) and discussed in Planning Council (PC) meetings before they are presented to the University Council and then broadly distributed through the PC webpage. Strategic planning and strategic plan objective prioritization are centralized in the PC, which reviews the goal updates in each core theme, collects data from relevant groups in order to analyze strategic plan core theme objectives holistically, and sets priorities to inform budgeting in the next fiscal year. In this way, the integration of programs and services with respect to accomplishment of core theme objectives is ensured.

STANDARD 4.B – IMPROVEMENT CORE THEME ENGAGEMENT

4.B.1 Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.

4.B.2 The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.

The MSU strategic plan identifies seven meaningful indicators (see Standard 1, Core Theme Engagement Table) of achievement of progress towards fulfilling MSU's three Core Theme Engagement objectives. These indicators are used for improvement, to inform planning and decision making, and to direct the allocation of resources. These indicators and additional program specific indicators are used to improve the strategies (detailed below) that support engagement as discussed in the following examples. Data on these indicators are tracked by OPA, the Outreach and Engagement Council, Office of Student Engagement, and by colleges and academic departments and units. Data are also collected by the programs that initiate strategies and collect assessment data to support, improve, or refine programs that support the strategic plan. University-level metrics are posted on the PC, OPA, and strategic plan webpages, and program-level assessments are published and appropriately distributed through posted assessment and/or annual reports.

Core Theme 3 Engagement: Examples of Strategies and Programs

The following examples describe in greater detail some of the strategies and programs that are focused on Core Theme Engagement objectives. Each example indicates the Core Theme Engagement objective(s) most closely associated with the strategy or program.

Outreach and Engagement Council (E1)
Beginning in fall of 2015, the Outreach and Engagement Council recommended and launched Montana State's first-ever seed-grant program to promote outreach and engagement activities in support of the MSU strategic plan. Funding for this program is provided by the MSU Office of the President to promote outreach and engagement activities involving faculty, students, and staff in partnership with local and regional constituents to address the needs of citizens in Montana and beyond. The Council received more than 60 applications for the first round of funding. Project ideas represented dozens of disciplines and community partners across the state. The Council has completed three rounds of funding totaling $60,000 to 12 projects.

MSU Extension (E1,E2,E3)
Created in 1914 to complete the triad mission of the land-grant university, Montana State University Extension's mission has always been to identify solutions to local problems by connecting to the network of scientists and researchers at the university and with nationwide Extension partners. MSU Extension has 92 agents and 32 specialists living and working in more than 60 communities statewide including every county and reservation.

Local agents offer extensive training opportunities ranging from how to safely serve and preserve foods, to how to prepare a will, to how to identify invasive weeds. Specialists stay at the forefront of their expertise areas and bring the most current information to agents who are able to meet Montanans on their farms and at their kitchen tables to provide specific interpretations and recommendations. Many faculty conduct leading research seeking effective, local solutions to challenges from improving the profitability of beef cattle operations to increasing Community Foundation resources to diversifying crops. Extension's focus is on giving clients tools to take action and make decisions that directly improve their lives and the health of their communities.

Extension's unique mix of local, state and federal funding provides a structure with strong accountability to the people. County agents, who are university faculty, complete needs assessments and work with local leaders to design programming that is most needed in the area. These agents report to their county commissioners, as well as to state-funded administration. All Extension faculty complete annual reports documenting their impacts.

Because of its structure which encourages long-term trusting relationships, Extension agents can be found coordinating disaster relief responses, as well as leading strategic planning committees focused on proactive activities to improve the future. Being local and having 100 years of building trusting relationships allows Extension to fully engage in their communities for long-term impacts.

MSU Extension provides leadership for the state's largest youth organization, Montana 4-H which reaches nearly 19,000 youth annually through over 30,000 projects related to science, engineering and technology, while developing leadership and citizenship skills. Volunteers in the 4-H program contribute tens of thousands of hours of service to their communities at an economic value of $2 million annually.

MSU Extension also houses the Local Government Center (LGC) which provides training to Montana's elected officials, volunteer board members and community leaders who are responsible for managing more than $1 billion in public funds and over 11,000 employees. The LGC provides more than 100 professional development classes across the state and also assists cities and counties with the constitutionally-mandated local government review process.

In 2016, in response to the state's high suicide rate, MSU Extension partnered with MSU's Center for Mental Health Research and Recovery, and One Montana in the Extension Mental Health Initiative. Extension's roles are to link constituents to mental health resources, provide relevant research-based educational programming, and help build community capacity to address mental health issues. Extension agents have been certified to teach Youth Aware of Mental Health in schools and Mental Health First Aid to help community members with mental health literacy and knowledge of what to do when faced with mental health situations or emergencies. Agents have also been instrumental in the assessment of a computer based cognitive behavioral therapy program, THRIVE, and will assist in recruiting individuals to participate in a study to assess the program's effectiveness in reducing depression in adults. These efforts are possible due to Extension's organization at the local level.

Boardroom Bobcats (E3)

Boardroom Bobcats, launched in August 2016 with seed-grant funding, places upper-level undergraduate and graduate students on nonprofit boards to serve as nonvoting members for the academic year. The mission of Boardroom Bobcats is to develop students as catalysts for positive change who seek lifelong commitments to community involvement and board service. Students gain practical boardroom experience, familiarity with the nonprofit sector, mentee opportunities and lifelong leadership skills, while creating value and lasting impact on nonprofit organizations and the greater community. Students regularly attend board meetings and complementary leadership trainings in nonprofit board work coordinated by MSU's Leadership Institute.

Engineers without Borders (E2,3)

While Engineers without Boarders is a national organization, the Montana State University chapter of Engineers without Borders (EWB@MSU) has been assessing and improving their projects for over 10 years. EWB@MSU has been working with the community of Khwisero, Kenya since 2004. This interdisciplinary group of students combines their talents to develop and implement water and sanitation projects in primary schools around Khwisero, Kenya. During the school year, students spend hundreds of hours fundraising, grant writing, and developing the projects that a student travel team will help implement the following summer in Kenya. EWB@MSU members are students from many different majors, including accounting, economics, engineering, sociology, graphic design, history, geology, and more. They work closely with a local board of directors in Khwisero to forge a powerful connection with the community and effect meaningful change in schools. EWB@MSU is committed to bringing clean drinking water to 58 schools in western Kenya, a project that could take decades. Its success depends so heavily on a healthy collaboration with the Kenyan people that students involved frequently describe it as "a social project with an engineering component."

Since 2004, the chapter has brought seven clean drinking water wells to schools in western Kenya, helping more than 3,500 students and teachers. It has raised more than $375,000 in donations and maintains more than 60 students from across the university as members. In the past 13 years, members have completed 32 projects in the Khwisero region of Kenya, 14 total water well projects (including the seven near schools), 15 sanitation projects, a water pipeline and two rainwater catchment systems, and an estimated 100,000 people have benefited from the projects.

The chapter has received numerous recognitions for its efforts, including the Premiere Chapter Award in 2009 from EWB-USA, and the Community Mediation Peacekeeper Award. The Association of Public and Land-grant Universities presented EWB@MSU with one of four W.K. Kellogg Outreach Scholarship Awards at its annual meeting in November 2011. EWB@MSU also received the prestigious C. Peter Magrath University Community Engagement Award in 2011 in competition with some of the largest universities in the nation. EWB@MSU was one of 15 MSU projects that helped the university earn the Carnegie Foundation's community engagement classification in January 2011. The classification brings national recognition to MSU's commitment to teaching and engagement by encouraging volunteer service in communities and dissemination of knowledge to benefit the public.

EWB@MSU used the results of varied assessments over its 13 years of engagement with the Khwisero region of Kenya to improve its engagement projects. In 2008, EWB@MSU formed a

Kenyan board, and after completing its initial goal of ranking all schools for receiving projects based on need, the board became an advisory group that continues today. The chapter also sends assessment teams one year prior to implementation trips to better understand the problems Kenyan communities face, and how to best fix them. In 2009, the chapter brought on a project manager in Kenya who implemented a biogas latrine, and conducted the first household surveys to learn more about Khwisero and EWB@MSU's impact on the region. In 2013, the chapter increased its efforts to be responsive to community needs. Members started working with health and sanitation teachers, encouraging them to teach students and the community about the benefits of sanitation, and how to properly use the new facilities that had come about from the projects.

Indian Leadership Education and Development (I LEAD) Project (E1)
The I LEAD Project provides a way for American Indian educators to receive the education and training they need to become school principals and superintendents while continuing to serve their communities as teachers. The original I LEAD grant, awarded in 2006, provided funding for 40 students from Montana; a second grant awarded in 2007 was for 30 students from Montana and South Dakota. The grant in 2012 provided funding for 40 students and was awarded in partnership with Little Big Horn College. Through that partnership, a center for Indian Education Leadership will be developed at Little Big Horn College. The center will be designed to generate and assemble research that will help I LEAD, and similar programs, to better prepare Native American school leaders. I LEAD was recently awarded a fourth round of funding in 2016 that will place 25 American Indian educators in leadership positions in Montana, North Dakota, South Dakota and Wyoming. These competitive grants have provided continuous funding from the US Department of Education since the program's inception in 2006, for a total of $4.8 million.

Participants enroll in a three-year program, complete online coursework, meet regularly at distributed locations including Little Big Horn College, and convene for three-week summer sessions at the MSU campus. While working toward advanced degrees, including a master's degree in educational leadership, students receive one-on-one mentorship from experienced American Indian school administrators. For students who commit to work as administrators in school districts with a high proportion of American Indian students for two years, the program covers tuition, fees, books and a summer stipend.

In 2006, there were only approximately a dozen American Indians licensed as Montana school administrators, and schools serving American Indian communities tended to be rural, underserved and have a high rate of administrative turnover. Now more than 100 American Indian educators are licensed as school administrators in Montana, and about 90 percent of these administrators are I LEAD graduates and serve in key leadership positions. The overall graduation rates across all I LEAD cohorts exceed 95% (2016 grant data not yet available) and more than 90% of graduates are placed in educational leadership positions serving American Indian community schools within three years of graduation.

One student from the first I LEAD cohort in 2009 went on to serve as superintendent of Wyola schools for five years before becoming principal at Crow Agency Public School. Another graduate was named by President Obama in Dec. 2011 to head the White House Initiative on American

Indian and Alaska Native Education, which is designed to help expand educational opportunities and improve educational outcomes for all American Indian and Alaska Native students. At the time of his appointment, the graduate said he left the program with "tremendous knowledge" that he had been able to apply to his work.

Bringing Native Community Experience to Nursing Students (E2)

This engagement partnership connects Montana State nursing students with the Native Community at the Fort Peck Reservation. Twice each year, approximately 16 Junior-level nursing students travel for one week each term to the remote Fort Peck reservation, in northeast Montana, 450 miles from Bozeman. Barriers to health care for this population include lack of local health care providers, hundreds of miles to adequate facilities and professionals, challenging winter weather, and poor financial support for such travel. Working with the tribal public health officer, nursing students provide well-child exams and educate the community on prevention efforts for widespread reservation health concerns like obesity, diabetes, tooth decay, teen pregnancy, suicide, and substance abuse.

To date, more than 10,000 medical exams and patient visits have been performed through this collaboration. The reservation reports that children are healthier and show improved academic achievement and decreased school absenteeism. Nursing students report increased confidence in working with and caring for children and benefits from working in a cross-cultural environment. The partnership is mutually beneficial, widening the educational and cultural experience of non-native nursing students, better preparing them for the workplace, improving health outcomes among the tribal residents, and providing additional mentors for Native children with interest in attending college and perhaps entering the health care profession.

Evaluation of student learning, in particular assessment of student cultural understanding, is completed through a variety of means. All students receive intensive multilayered and ongoing cultural information prior to the immersion experience. Students then complete a written reflective writing exercise during their immersion experience along with a follow up written reflective exercise several weeks after they return to campus. Results of the students' perceptions regarding culture, Native American culture, rural health care, social justice, and poverty are analyzed for change. Improvements to the program are made based on the student feedback regarding their experience.

Based on the success of the current program, MSU College of Nursing has discussed the possibility of expanding this clinical model for nurses in partnerships with some of the other tribal communities in Montana.

Convocation (E1)

MSU Convocation, launched in 2007, is an annual event that celebrates Freshmen entering MSU. A key goal of Convocation is to enhance freshman retention to the sophomore year and longer term graduation rates. The event is organized by the Convocation Committee, which includes students, community members and MSU faculty and staff. The purpose is to establish a strong academic connection between freshmen and Montana State University by celebrating their MSU beginning with classmates, students, staff, faculty and the Bozeman community. Convocation supports the

creation of lasting bonds, meaningful communal learning, and shared positive energy to support student success by highlighting the culture and mission of MSU, the value of scholarly pursuits, and the importance of campus and community involvement.

Centered around a highly inspirational speaker and author, the event also includes many supporting activities and materials reinforcing that year's theme. One activity, One Book One Bozeman (OBOB), encourages the community to share the first-year students' common read – a work written by or closely related to the Convocation speaker. OBOB brings people together for meaningful discussions and to build community relationships. 2016 was the 9th year of the program, hosted by the Bozeman Public Library Foundation in partnership with MSU. Additional activities are organized depending on the interest and theme of the speaker. In 2013 with speaker Yann Martel, MSU held a statewide writing competition of short fiction, essays, and poetry. In 2016 with Wes Moore, MSU hosted Convocation Service Saturday to begin the academic year with an emphasis on Mr. Moore's message about the importance of mentorship and service. Service Saturdays continue throughout the year, with local service projects in partnership with community non-profit organizations. Held on the first Saturday of the month, they offer a great way for community members and students to create relationships while working to enhance Bozeman. The 2017 Convocation will feature Bryan Stevenson, a social justice activist, public interest lawyer and founder of the Equal Justice Initiative.

Feedback about the event is gathered in several ways: debriefing with Convocation Committee members; discussions with the President and Provost; and, conducting a student survey. In 2012, the format of the event changed to mirror commencement with the freshman sitting on the auditorium floor and the faculty and deans dressed in the regalia that they wear for commencement. The goal of this format was to focus on creating a memory of inspiration and building expectations for students to carry through to their graduation in four years. The President's message sets the context and recognizes the sacrifices students make to come to MSU and the challenges and accomplishments that they will see along their journey to graduation.

Assessment of Convocation also led to the development of MSU Debut, which brought together a suite of new student engagement activities, including Convocation, under a common communications umbrella to promote a greater sense of belonging for new students, prepare them for the first few weeks of the semester, and introduce them to community and student-support resources. The MSU Debut team in turn has developed a rigorous assessment and planning regimen.

Spotlights

APLU Community Engagement Award (E1)
In 2011, MSU received the APLU's C. Peter Magrath Community Engagement Scholarship Award to recognize colleges and universities that have redesigned their learning, discovery, and engagement missions to become even more involved with their communities. MSU was recognized for the contributions its students have made in bringing clean water to a region in Kenya through the work of the MSU chapter of Engineers Without Borders (see above).

Carnegie Community Engagement Classification (E1,E2,E3)

In 2011, the Carnegie Foundation for the Advancement of Teaching has awarded MSU its community engagement classification. The classification brings national recognition to MSU's commitment to teaching that encourages volunteer service in communities and the spreading of knowledge that benefits the public.

- The 15 partnerships MSU highlighted in its application are:
- Horizons Community Leadership to Reduce Poverty;
- The Museum of the Rockies and MSU Collegiate Partnership;
- MSU School of Architecture's Community Design Center;
- Engineers Without Borders at MSU;
- MSU's Local Government Center;
- MSU Western Transportation Institute's mobility and public transportation division;
- Towne's Harvest Garden;
- Techlink;
- Montana INBRE-IDeA network;
- Center of Native Health Partnerships;
- MSU Summer Reading;
- Center for Biofilm Engineering;
- Thermal Biology Institute;
- Montana Manufacturing Extension Center; and,
- Campus Corps Service Learning.

Office of Student Engagement (E1)

The Office of Student Engagement (OSE) provides and facilitates student engagement opportunities for MSU students with the mission of fostering meaningful engagement opportunities that challenge, support and empower students to be leaders on campus, in the community and beyond. The Office is THE HUB for students interested in connecting with their fellow Bobcats through student government, student organizations, programs and events, and engaging in service to the community.

Developing Excellence in Academic Leadership (DEAL) (E3)

DEAL's objective is to encourage best practices and collegial development of MSU's current and future academic leaders through highly interactive monthly workshops that allow participants to both explore a variety of substantive topics and create personal networks across disciplines and units at MSU. Session topics vary by year, but typically include such subjects as leadership theories and skills, conflict management, collaboration and teamwork, and managing a career, all in the specific context of MSU. Founded in 2009, DEAL, part of the Center for Faculty Excellence, now boasts over 120 alumni. Offered every other year, each year's cohort consists of approximately 20-30 participants from a wide variety of academic and administrative units.

The Year of Engaged Leadership (E3)

In 2013-2014, the "Year" highlighted the many events and activities of the university that help develop the leadership skills of students, faculty, staff and community members. The Year included academic and non-academic programs, with each month focusing on a single characteristic of leadership such as listening, empathy, stewardship and community building. Every person has

leadership qualities, and the Year of Engaged Leadership was intended to draw out those qualities, and in the process, advance others.

MSU Leadership Institute (E3)

The MSU Leadership Institute reports directly to the Office of the Provost. Created in 1997 by the Associated Students of Montana State University to support leadership development for students, the Institute's objective is to provide, coordinate, plan, and organize leadership opportunities on a system-wide basis. It provides a variety of student-focused leadership opportunities designed to enhance and build essential career and life skills.

Eclipse Ballooning Project (E1,E2)

Total eclipses are rare and very impactful events. For those who have witnessed them, it is a memory they keep forever. The NASA Space Grant network at MSU is in a unique position to engage the public in an awe-inspiring and educational way and for a small cost. Students will conduct high altitude balloon (HAB) flights from 25 locations across the total eclipse path, from Oregon to South Carolina on August 21, 2017, sending live video and images from near space to the NASA website. While the cost of conducting HAB flights is low, there are interesting challenges presented by this highly collaborative effort. These challenges are broad – technical, political, administrative – and present an amazing hands-on learning opportunity for the students who participate. Several potentially long lasting partnerships with other federal agencies and with industry will develop.

Pollinator Health Center (E1)

The mission of MSU's Pollinator Health Center is to improve pollinator health and mitigate pollinator losses through research, education, and outreach endeavors. Pollinators, including bees, are essential for plant reproduction in agricultural, non-agricultural, and natural landscapes. The outreach activities involve undergraduate and graduate students who are performing experiments and are involved in the development and expansion of undergraduate, graduate and community courses. The courses will use honey bees as a model to explain topics in virology, genetics and biotechnology, while underscoring the importance of pollinators in all ecosystems and the role of basic science in addressing problems of global scale, including loss of bee pollinators.

IDeA Network of Biomedical Research Excellence (INBRE) (E1,E2)

The Montana INBRE is a collaborative network of Montana-based universities, colleges (including tribal colleges), and research institutions that invests in the state's biomedical research capacity and workforce pipeline. The network has a specific Community Engagement Core (CEC) whose goals are to foster and enhance tribal and rural community partnerships designed to mitigate health disparities; build sustainable collaborations using community-based participatory research (CBPR) methods; improve community health through engagement, dialogue, and collective problem solving; and help create and maintain equitable research collaborations. In addition, the network sponsors Café Scientifique in Bozeman and Butte, Montana. Café Scientifique provides a relaxed setting for people to learn about current scientific topics. The concept started in England in 1998 and has spread to a handful of locations in the United States. Following a short presentation by a scientific expert, the majority of time is reserved for lively conversation, thoughtful questions and respectful dialogue between MSU researchers and the community.

The Office of International Programs - Study Abroad Program (E2)
The Study Abroad Program offers more than 250 study abroad programs in more than 60 countries. The program provides resources, advising and support to students in all majors wishing to enhance their college education by studying abroad. Study Abroad at MSU offers short-term, summer, semester and year-long programs to promote global engagement. It also offers opportunities to share the Study Abroad experience after students return through the Friends International Buddy Program, a short program at the start of the semester that pairs incoming international students with US students, and the Global Ambassador Internship that is designed to give Study Abroad Alumni the ability to practice and enhance skills learned abroad while contributing to the growth of International Education on campus.

CORE THEME 4: INTEGRATION

Description:	Integrating learning, discovery, and engagement is the marquee feature of the MSU strategic plan. Traditionally, land-grant universities have educated students, conducted research and provided outreach to their communities and states. MSU has gone a step further by regularly integrating research and teaching, practicing service-learning, and combining research with outreach. With this plan, MSU boldly defines itself as a 21st century land-grant university where learning, discovery, and engagement merge seamlessly to the benefit of students, faculty, staff, and the wider community.
Goal Integration (I):	By integrating learning, discovery and engagement, and by working across disciplines, the MSU community will improve the world.
Objectives:	I.1: Increase the integration of learning, discovery and engagement. I.2: Increase work across disciplines.

MSU is a land-grant institution with a long history of excellence in teaching and learning, research and creativity, and service and outreach. MSU carries out its commitment to the integration of learning, discovery and engagement as a core theme by realizing this historic land-grant commitment in new ways suited to addressing today's contemporary issues.

As Agriculture is one of the most significant industries in Montana, MSU delivers a variety of programs, research and outreach services that enrich and advance the agricultural enterprise in the state and elsewhere. From crops and livestock to land management to nutrition, photonics, public health and economics, MSU is researching issues that are specific to Montana. This research drives new innovations in agriculture such as new crop varieties and vaccines that help Montana producers. In particular, research in the Montana Agricultural Experiment Station (MAES) is enhanced by seven research centers strategically located across the state. The research conducted by MAES scientists at its research centers and on the Bozeman campus is driven by current and future needs. This research has high impact on current challenges faced by food producers. The MSU County Extension offices help to share knowledge generated by MAES and other faculty through coordinated needs-assessments and program development tailored to the local region, making it accessible and useful to individuals, families and communities.

The cornerstone of assessment, decision-making, and improvement for each core theme is MSU's Mission and the objectives outlined in the strategic plan. Assessment and improvement for Core Theme Integration is overseen by the highest administrative levels (University Council and the President) and governed by the collaborative process described in Standard 3. Originally efforts towards integration emerged organically out of the work that faculty and students were doing in classrooms, research laboratories, studios, field sites, archives and communities. The establishment of the Outreach and Engagement Council institutionalized the university's commitment to engagement and integration by providing some resources for seed funding to support this type of work. The leaders in assessment for integration are the Outreach and Engagement Council, Department Heads, Deans, and the Colleges; together and in collaboration with the OPA they evaluate data, review assessments, recommendations, and observations from faculty, departments, programs and units around campus.

The integration timeline below (see Figure 4.9) provides a sample overview of the assessment and improvement process for Core Theme Integration, and the narrative that follows provides a description and evidence to illustrate how MSU meets the standards for assessment and improvement. First, Standards 4A and B are addressed; second, evidence to support those standards are offered in the form of examples that outline the assessment, planning and improvement process as it operates for selected programs that integrate learning, discovery and engagement; and third, featured spotlights that document MSU's commitment to integration are provided. These efforts illustrate how MSU is moving towards its objectives for integration.
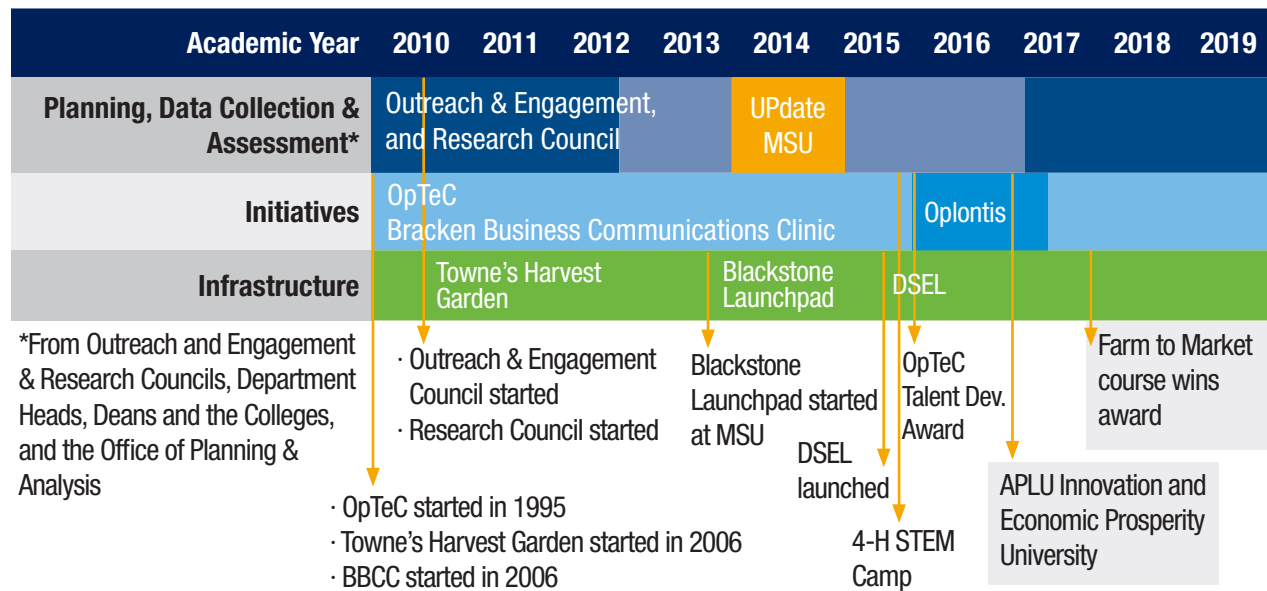

Figure 4.9: Core Theme 4 Integration Timeline

STANDARD 4.A – ASSESSMENT CORE THEME INTEGRATION

4.A.1 **The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.**

4.A.2 **The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.**

4.A.3 **The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.**

MSU engages in the systematic and meaningful collection of data that informs planning, assessment and improvement to move MSU towards the objectives outlined for Core Theme Integration. Data collection and analyses are ongoing, systematic and meaningful and provide information to guide continued quality improvement of institutional programs and services. Institutional evaluation of effectiveness for Core Theme Integration is based on the performance indicators included as metrics in MSU's Strategic Plan. The Office of Planning and Analysis (OPA) collects and tracks these verifiable metrics (see Standard 1, Core Theme Integration Table). These data are also presented in monthly Planning Council meetings where members consider the appropriateness of indicators and of the strategic plan targets for Core Theme Integration. Institutional-level data on the integration performance indicators are updated as new data are available and reviewed by University Council at least twice a year to track progress towards the integration objectives. Additional data to inform the decision-making process and support assessment and improvement of Core Theme Integration programs are provided by OPA, the Outreach and Engagement Council, colleges and academic departments and units, and program leaders.

In 2014, the Center for Faculty Excellence began a faculty learning community on integrative teaching. Although efforts to support service learning at MSU can be traced to 2003, in 2016 the CFE reintroduced professional development in designing and implementing service learning courses. The Service Learning Advising Committee, consisting of faculty who may be from any academic department and a community member, offers workshops and resources to support faculty in teaching service learning courses and publishing on this topic. Assessments are conducted at the end of all workshops.

4.A.4 **The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.**

4.A.5 **The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.**

4.A.6 **The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.**

Existing programs and services are holistically aligned to accomplish core theme objectives. Requests for investments in new or existing integration initiatives must propose how they will assess the extent to which the programs and initiatives generate outcomes that contribute to the success of students, faculty, staff and the larger institution and will directly or indirectly contribute to Core Theme Integration objectives. There has been a concerted effort to support strategies, small and large, with one-time investments that can become permanently funded if assessment shows that the program has been successful (and has demonstrated its alignment to the strategic plan). The annual strategic plan reports (2012, 2013, 2014, 2015, 2016) highlight strategies, budget alignment, and successes for Core Theme Integration.

Assessment of programs and services directed at Core Theme Integration occurs at multiple levels (unit, program, department, college, and university). However, strategic plan goal updates are produced by OPA and discussed in PC meetings before they are presented to the University Council and broadly distributed through the PC webpage. Strategic planning and strategic plan objective prioritization are centralized in the PC, which reviews the goal updates in each core theme, collects data from relevant groups in order to analyze strategic plan core theme objectives holistically and sets priorities to inform budgeting in the next fiscal year. In this way, the integration of programs and services with respect to accomplishment of core theme objectives is ensured.

STANDARD 4.B IMPROVEMENT CORE THEME INTEGRATION

4.B.1 **Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.**

4.B.2 **The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.**

The MSU strategic plan identifies six meaningful indicators (see Standard 1, Core Theme Integration Table) of achievement of progress towards MSU's two Core Theme Integration objectives. These indicators are used for improvement, to inform planning and decision making, and to direct the allocation of resources. These indicators and additional program specific indicators are used to improve specific strategies (examples detailed below) that support integration. Data on these

indicators are tracked by OPA and by colleges and academic departments and units. Data are also collected by the units or divisions who initiate strategies and collect assessment data to support, improve, or refine initiatives that support the strategic plan. University-level metrics are posted on the PC, OPA, and strategic plan webpages, and program-level assessments are published and appropriately distributed through posted assessment and/or annual reports.

Core Theme 4 Integration: Examples of Strategies and Programs

The following examples describe in greater detail some of the strategies and programs that are focused on Core Theme Integration objectives. Each example indicates the Core Theme Integration objective(s) most closely associated with the strategy or program.

OpTec Connects MSU to Montana Business Communities (I1)

The study of optics has a long history at MSU. The establishment of Optical Technology Center (OpTeC) as a center of excellence in photonics in 1995 was an early effort in integrating student learning, community engagement and cutting-edge research. MSU founded the center in response to the business growth in the community using NSF EPSCoR seed money, money from the State of Montana and a significant internal investment. OpTeC educates students, and develops technologies that are improving health care, remote identification of invasive species and geographical identification of agronomic conditions for farming and forestry practices. Through this technology development; OpTeC has spun out over two dozen local companies (Figure 4.10). OpTeC is also interdisciplinary with 20 faculty in nine departments across three colleges working on its initiatives and service.
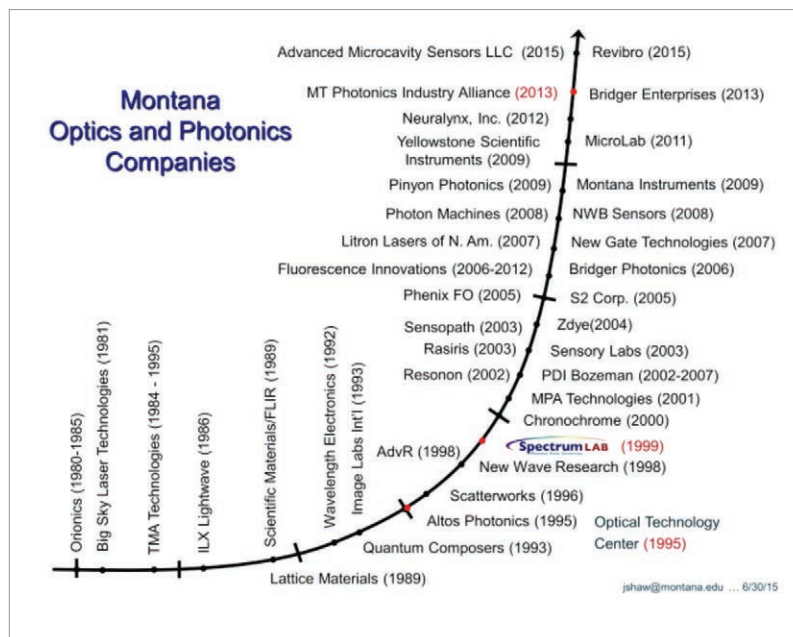

Figure 4.10: Montana Optics and Photonics Companies

(Joseph A. Shaw, "Synergistic development of optics education and industry in a small university town", Proc. SPIE 9793, Education and Training in Optics and Photonics: ETOP 2015, 97932J (October 8, 2015); doi:10.1117/12.2223218)

The world-class research performed by OpTeC faculty has helped establish more than 30 optics-related companies in Bozeman, up from one in 1980. Fifteen of those were started by MSU graduates, most with Ph.D.s. Many others are based on technologies transferred from the university. Bozeman has about six optical companies, per 10,000 residents, compared to the two per 10,000 in Tucson, Arizona, which is considered the center of optics activity in the United States.

OpTeC faculty members have received international, national, and regional recognition for their work in the areas of optics research and education. In a very competitive awards environment, the University Economic Development Association named OpTeC winner of the Talent Development Award in September 2015, citing the numbers of companies and jobs created in Montana. The Photonics Industry Association determined that more than 500 jobs exist in these companies, with an average salary of over $60,000, twice the average salary for the region. Most employees in this sector are graduates of Montana State's photonics programs.

MSU has worked with stakeholders composed of businesses in Montana to identify educational and other resources needed to support the economic development of the community. For example, when photonics company stakeholders expressed a need for a larger employee pipeline, MSU developed a new Master's degree and undergraduate minor in laser and imaging optics. When stakeholders said they needed technicians, Gallatin College, in close collaboration with industry, began working toward an Associate degree for photonics laboratory technicians. The first students enrolled in that program in fall 2016.

Oplontis Exhibit at MSU's Museum of the Rockies (I1,2)

MSU's Museum of the Rockies (MOR), a Smithsonian affiliate, hosted an innovative and unique talent development program based on an art history and archeology project. "Leisure and Luxury in the Age of Nero: The Villas of Oplontis" opened to the public at MOR in June 2016 and ran through December 2016. Montana State is one of only three U.S. venues for this exhibit. This exemplary program integrates archaeological digs and a museum exhibit for curriculum and talent development with creative research and teaching practices in an innovative, interdisciplinary collaboration. Museums have historically offered opportunities for training students in expected curricula such as art, archaeology and museum studies programs, but rarely have museums realized opportunities to train students in unexpected areas. MSU and MOR broke down those barriers when offered the opportunity to study and exhibit artifacts and art from Oplontis.

The project creatively integrates discovery through original research, learning through the curriculum and through the exhibition itself, and engagement with visitors to MOR and K-12 school audiences, all while crossing historic boundaries, real and imagined, within the university, throughout the state, and across the globe. Faculty and students across as many different colleges, departments and majors at MSU as possible are engaged and provided support and opportunities to integrate a one-time only exhibit at the Museum of the Rockies with their curricula and achieve active learning experiences. A key component was to allow these same students direct access to the expert scholars involved with the research related to the exhibit, again, across a range of disciplines that included the sciences and the humanities.

The Oplontis project enabled twelve educators from MSU to travel to the site and develop interdisciplinary curricula in such diverse fields as agriculture, earth sciences, history, political science, art, ethics, philosophy, archaeology, education, and architecture to inform courses that were offered in 2016 and beyond (Table 4.9). Thirty-five seminar instructors also used this material in the required first-year seminar in fall 2016, impacting students throughout the university. For more than a year this group of teachers worked closely to integrate the many aspects of this project into a cohesive, interdisciplinary framework of courses. More than 1250 MSU students participated in the Oplontis-specific courses for the fall 2016 semester, and an additional 3000 first-year students participated through first year seminar courses. Beyond the campus, a Bozeman High School teacher also traveled to the site and helped to design and prepare K-12 curricula. An art history class at Bozeman High will deliver this new curriculum to 25 students in 2017-18.

Table 4.9: Oplontis Related Curriculum at MSU and Bozeman High School

Timing	Course
Spring 2016	HONR 204D Honors College
Summer 2016	ARTH 492 – Art History Trip to Italy included these departments: Agriculture, Art History, Studio Art, Architecture, Cell Bio & Neuroscience, Earth Sciences, University Studies, Honors, Philosophy
Fall 2016	BIOB 260 US 101US First Year Seminar ERTH 102 (3 different sections, 3 different topic areas) PHL 312 PHL 491 CAA 491-002/003 (ART) CAA 491-004 (ARCH) ARTZ 105 ARTZ 109 Other courses were created related to Oplontis from Arts, Art History, Architecture, Cell Bio & Neuroscience, Earth Sciences, University Studies, Honors, Philosophy
Future	"Great Expeditions: Science, Ethics and Politics from Ancient Rome to Today" - Honors College Spring 2017 Art history class - Bozeman High School, AY 2018

The Oplontis project administered a pre and post survey instrument prior to the students' first visit to the exhibit, and then again at the end of the course. The survey was created using language from four of the Association of American Colleges & Universities (AAC&U) VALUE Rubrics for the LEAP Essential Learning Outcomes: Integrative Learning, Intercultural Knowledge & Global Learning, Lifelong Learning, and Creative Thinking & Critical Thinking. Additionally, participants were asked to express what they enjoyed most about their course or a particular assignment, and what they enjoyed most about the Oplontis exhibit.

Although analysis is ongoing, the results will lead to recommendations for engaging students in a learning process that allows them to make connections across courses in an impactful manner, while also building social and cultural capital and a sense of belonging to the campus. Understanding

the lessons learned from this project will also help faculty use it as a model for ways to create interdisciplinary topics in the future.

Messengers for Health: Educating the Healthcare Community on the Language of Tribal Healthcare (I1)

Many partnerships exist between MSU and the Crow/Apsáalooke reservation. In one, researchers from MSU's Department of Health and Human Development have established a national model for cancer research and prevention and for community-based partnership research. This program brings together MSU researchers with Crow/Apsáalooke community members who jointly developed a program to study the effectiveness of utilizing community women (called Messengers) to deliver education, to encourage Crow women to receive cancer screenings, and to partner with the Indian Health Service to provide high quality care to tribal members. They received two research grants from the American Cancer Society in 2001 and 2005. The program also was designed to educate members of the healthcare community on traditional healing and wellness approaches and philosophies of Native Americans and on appropriately working with members of the Apsáalooke Nation and has changed the very language of tribal healthcare.

The work of Messengers for Health has been assessed using both qualitative and quantitative approaches and the results of these assessments are reported on the Messengers for Health Current Projects website and in peer reviewed and other publications. For example, results from quantitative surveys in the community reveal cervical cancer knowledge gains, gains in participants' comfort discussing cancer issues, and gains in awareness of cervical cancer and the Messengers program. The community impact of Messengers for Health has been dramatic. Not only are Crow women now talking about cancer screenings to each other, they are approaching project staff in public and asking for appointments to be scheduled. Cancer survivors are speaking out in public, and a support group has started where people publicly show that cancer is not a death sentence. Cervical cancer, once a quiet and deadly epidemic among the Crow women, is now discussed openly. The statistically significant increase in knowledge of cervical cancer and the positive shift in attitudes regarding screening and care are notable. One tribal member expressed the overall impact of the Messengers for Health as, "Women are the backbone of the Crow community. Cure the women and you cure the community."

The results of this work are provided to the Apsáalooke community through community meetings and reports and through peer-reviewed publications and presentations at national conferences such as The American Public Health Association. The collaboration between the community and the researchers at MSU has resulted in the development of culturally sensitive training materials for community outreach workers, as well as videos, training, and a mentoring program to help educate health providers who work at the Crow Agency Indian Health Service.

The Design Sandbox for Engaged Learning (DSEL) (I2)

DESL, pronounced "diesel," is an interdisciplinary collaboration space launched in 2015 as part of the College of Arts and Architecture where faculty, students and industry professionals use design thinking to solve myriad challenges. Open to any student, the lab welcomes business, graphic design, engineering and other students to come together to tackle unusual and challenging design questions and gain experience working as a member of a team. Additional funding was provided in 2016

through the Humanities, Arts and Social Sciences grants from the VP for Research and Economic Development. DSEL's mission is to transform the educational experience for students at MSU.

One of the DSEL courses recently won the Core77's Design Education Initiative Award. Founded in 2011, the Core77 Design Awards champion the principles of inclusivity, innovation, and excellence. The Design Education award recognizes a business-education or nonprofit-education partnership initiative that furthers the practice of design or promotes design education. The Farm to Market course is an interdisciplinary course that challenges undergraduate and graduate students to solve real-world problems for Montana's specialty crop farmers. Farm to Market was developed and taught for students in three disciplines by three professors from three departments in three colleges: Graphic Design (Art & Architecture); Marketing (Jake Jabs School of Business; and, Nutrition (Health and Human Development). This course asks students to meet with three different local community farm partners and use the Design Thinking process to define specific problems they could solve that would use the three disciplines of marketing, graphic design and nutrition.

Bracken Business Communications Clinic (I2)

The Bracken Business Communications Clinic (BBCC) integrates learning, discovery, and engagement to help hundreds of Jake Jabs College of Business and Entrepreneurship (JJCBE) students improve their communication skills every year. The BBCC's mission is to give students the tools they need to communicate effectively and continue learning from all the people they interact with both at school and at work. Professional coaches with abundant experience in business communication work one-on-one with students who are writing papers, preparing presentations, and creating job application materials. This specialized instruction gives students an advantage not only during their time at MSU, but also when they enter the job market, because students often visit the BBCC for help with résumés, cover letters, and professional email correspondence after they graduate.

During the 2016-2017 academic year, BBCC coaches worked with more than 600 students, helping them discover their communicative strengths and improve their communicative weaknesses. The BBCC partners with the Director of the Business Communications Curriculum to use communication theory to inform the feedback and information given to students during their coaching sessions, thereby creating an interdisciplinary synergy that blends the study of communication and the study of business. BBCC coaches also deliver dozens of classroom presentations and workshops every semester that provide additional instruction integrating communication theory with the business-focused work students have been assigned in their courses. Because trends in business communication evolve rapidly, the BBCC staff works hard to continuously modify BBCC services based on the needs of students and instructors.

Student visits to the BBCC increased by 25% from the 2014/2015 academic year to the 2015/2016 academic year and by another 25% for the 2016/2017 academic year. Students who visit complete a satisfaction survey, and the director works closely with faculty to ensure they are seeing improvement in students' skills. Another effective method of assessment for the BBCC involves a project completed every few years by students taking the Professional Business Communication course. Most recently completed in Spring 2017, the project asks approximately 300 students to research current business communication trends, evaluate the services provided by the BBCC, and suggest changes or

improvements. The BBCC staff uses the feedback generated by students to evaluate and improve its current programs and create new ones.

The BBCC staff experiments with new services every semester, and the upcoming school year will be no exception. Students asked for more opportunities to practice the skills needed for video conferences, so the BBCC will offer remote appointments that require the student and coach to interact online instead of in person. Students also asked for more opportunities to engage and collaborate with each other, so the BBCC is developing workshops that will allow students to practice communication skills in groups. The college's faculty and administration have shown a desire to increase and improve interaction among international students and domestic students, so the BBCC is creating programs that will help international students become more confident in their English skills, thereby improving communication among the student body and giving students more opportunities to discover cultural similarities and differences. Students who communicate well open themselves up to new ideas and different perspectives.

Spotlights

APLU Designated MSU as an Innovation and Economic Prosperity University (I1)
The Association of Public and Land-Grant Universities (APLU) recognizes that land-grant universities strive to integrate talent (education), innovation (research and discovery) and place (engagement efforts) to improve their states and the world. Through a self-study and planning process followed by competitive review, APLU designates Innovation and Economic Prosperity (IEP) universities who have shown that integration is a strength. MSU submitted its nomination and was successful in gaining the IEP designation in 2016.

Blackstone LaunchPad (I2)
Launched in 2013, the MSU Blackstone LaunchPad works with students one-on-one to introduce entrepreneurship as a viable career path and allow them to test their business ideas, utilizing mentors from within the university and across the nation to provide resources, skills and guidance to transform new ideas into viable companies. 406 Labs is a program of the Blackstone LaunchPad that provides focused resources designed to help high-growth potential LaunchPad ventures and establish product-market fit. Funded in part by a $50,000 grant from the U.S. Small Business Administration, the program assists companies with various items related to launching a business, including prototype creation, go-to-market strategy, business development pipeline creation, sales training, fundraising strategy and hiring. A wide network of Montana-based mentors assists each company that is selected to participate in 406 Labs.

Towne Harvest Garden (I1)
Towne's Harvest Garden is another program that fulfills MSU's land-grant history. The MSU Friends of Local Foods Student Organization, formed in the fall of 2006, brings a diverse group of students and faculty together to raise awareness about local foods and encourage sustainable lifestyles on campus and in the community. During the summer of 2007, Friends of Local Foods collaborated with the Gallatin Valley Food Bank to support a 2-acre diversified vegetable farm called Towne's Harvest. Towne's Harvest Garden also represents a collaborative effort among students, faculty, and administrators of the Colleges of Agriculture and Education, Health & Human Development to

implement the latest research and promote sustainable agriculture and local foods at MSU and in the Gallatin Valley.

4-H Day Camp Increasing Youth Interest in STEM (I1)
A faculty member in agricultural education has partnered with county 4-H leaders to meet the need for increasing interest among youth in science, technology, engineering and math (STEM) education. Students collaborated with county 4-H leaders to design a STEM-based day camp. The goal of the camp was to foster the exploration of knowledge and research in STEM fields. The camp was successfully held at MSU in 2015, with the students teaching workshops to 4-H youth and leaders.

Interdisciplinary Research Centers (I1,2)
MSU has more than 40 centers, institutes and programs that integrate research, education, and engagement and emphasize interdisciplinary approaches. Some are detailed below.
- The **Center for Mental Health Research and Recovery**, created in 2014, seeks to respond to specific challenges associated with diagnosing and treating serious mental illnesses such as major depression, bipolar disorder and schizophrenia that severely restrict quality of life and are often a prequel to suicide. The Center is a collaboration between Montana State University and the Montana chapter of the National Alliance of Mental Illness (NAMI). This Center combines clinical health and basic research resources to improve the process of diagnosing and treating serious mental illness through collaborative efforts between neuroscientists, social scientists, clinicians, engineers, and those affected by mental illness, and their families.
- **Wildfire PIRE** is an NSF Partnership on International Climate, Fire, and People, funded in 2010, focusing on the causes and consequences of fire. This interdisciplinary partnership brings together an array of fire scientists and managers and strives to be a leader in interdisciplinary discovery, education, and engagement focused on wildfire in temperate ecosystems on multiple continents.
- The **Science Math Resource Center** (SMRC), started in 1993, sponsors professional development in science and mathematics education for MSU faculty, supports summer and school year opportunities in math and science for K-12 teachers and their students, and sponsors public awareness opportunities. The SMRC also promotes and funds the science Olympiad which brings 1,100 Montana middle and high school students to campus each year.
- The **Western Transportation Institute's** (WTI) mission is to make rural travel and transportation safer, more convenient and more accessible through research, development and testing, education and technology transfer. Established in 1994, the WTI was awarded a $7.5 million dollar grant in 2016 from the U.S. Department of Transportation to establish it as a Tier 1 University Transportation Center. WTI has a broad focus of addressing everyday rural challenges, which encompass infrastructure, materials, corrosion, winter maintenance, transportation planning, engineering, human factors and ergonomics, ecology, Intelligent Transportation Systems and systems engineering.

CORE THEME 5: ACCESS	
Description:	Land-grant universities were established by Congress in 1862 with the explicit intent to educate the sons and daughters of the industrial classes. MSU continues to fulfill that intent, believing that education serves society as a whole through job creation, stronger civic participation, and a reduction in the society costs borne by a less educated populace. MSU does not turn away qualified Montanans and will continue to provide access to a quality education for all students to improve the state and the well-being of its citizens.
Goal Learning (A):	Montana State University is committed to widening access to higher education and ensuring equality of opportunity for all.
Objectives:	A.1: Educate more students while maintaining the quality of programs A.2: Diversify the student body.

Providing access to higher education for a larger and more diverse population was the goal of the Morrill Act of 1862 that established land-grant universities. Today, broadening access to MSU means new opportunities for students from different places, representing different backgrounds and learning in different ways. Not only do individual students, who might not otherwise have educational opportunities, benefit when access is widened, but all students benefit from exposure to diversity of experiences and ideas. Educational research demonstrates that a diverse student body leads to important educational benefits such as the reduction of prejudice; growth in cognitive abilities, critical thinking skills and self-confidence; the promotion of civic engagement and skills needed for professional development and leadership; and improved curricula and classroom environments. MSU's Core Theme Access includes objectives that expand educational opportunities while protecting excellent quality education, enrollment growth across all sectors and targeted efforts to increase diversity for the benefit of all students.

MSU has made great strides in its ability to meet the educational needs of any qualified Montanan with the desire to pursue further education. Through the addition of new one-, two- and four-year certificate and degree programs, technologies that enable both synchronous and asynchronous learning for place-bound students, innovative course offerings that address contemporary demands, and increased financial aid coupled with low tuition, MSU has been able to open new doors for students.

MSU must continue to expand educational opportunities while protecting the excellent quality of education for which MSU is known. This goal pairs enrollment growth across all sectors with targeted efforts to increase diversity for the benefit of all students.

The Core Theme Access timeline below (Figure 4.11) provides a sample overview of the assessment and improvement process for Core Theme Access and the narrative that follows provides a description and evidence to illustrate how MSU meets the standards for assessment and improvement. First, Standards 4A and B are addressed; second, evidence to support those standards are offered in the form of examples that outline the assessment, planning and improvement process as it operates for access; and third, featured spotlights that document MSU's commitment to access

are provided. The programs featured give a glimpse into the types of strategies MSU is using to provide educational opportunities and to make sure that students, once at MSU, are able to be successful. Many of these programs cross over with those offered in support of Core Theme Learning.
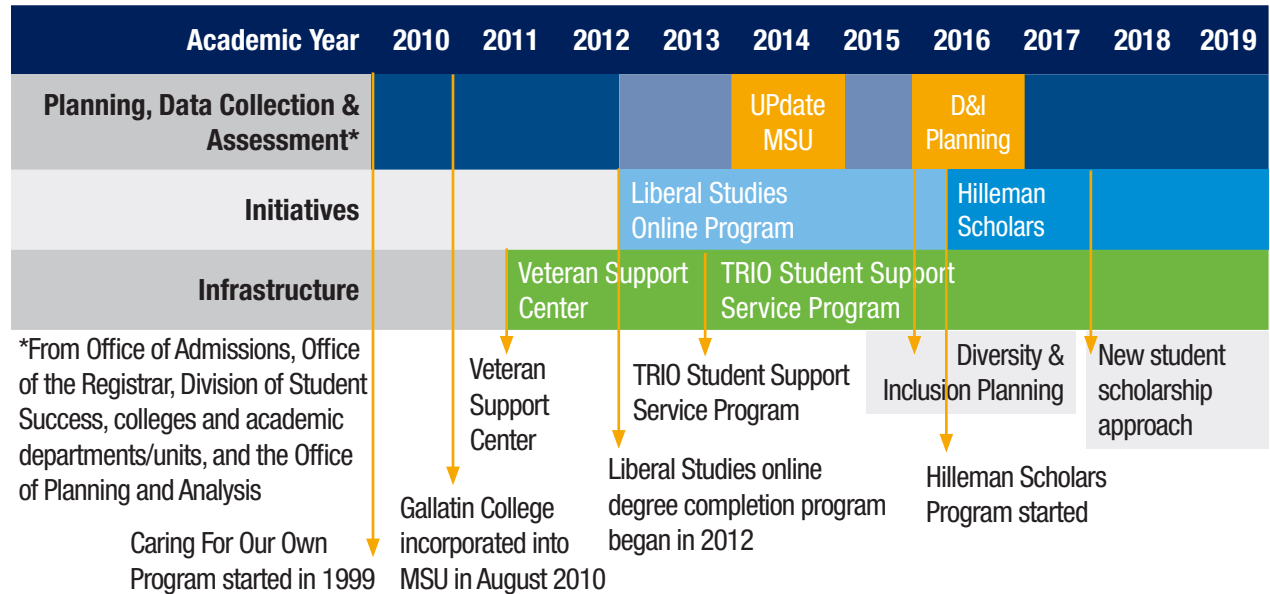
Academic Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Planning, Data Collection & Assessment*					UPdate MSU		D&I Planning			
Initiatives				Liberal Studies Online Program			Hilleman Scholars			
Infrastructure			Veteran Support Center	TRIO Student Support Service Program						

*From Office of Admissions, Office of the Registrar, Division of Student Success, colleges and academic departments/units, and the Office of Planning and Analysis

Caring For Our Own Program started in 1999

Veteran Support Center

Gallatin College incorporated into MSU in August 2010

TRIO Student Support Service Program

Liberal Studies online degree completion program began in 2012

Diversity & Inclusion Planning

Hilleman Scholars Program started

New student scholarship approach

Figure 4.11: Core Theme 5 Access Timeline

STANDARD 4.A – ASSESSMENT CORE THEME ACCESS

4.A.1 The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.

4.A.2 The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.

4.A.3 The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.

MSU engages in systematic and meaningful collection of data that informs planning, assessment and improvement to move MSU towards the objectives outlined for Core Theme Access. Data collection and analyses are ongoing, systematic and meaningful and provide information to guide continued quality improvement of institutional programs and services. Institutional evaluation of effectiveness for Core Theme Access is based on the performance indicators included as metrics in MSU's

strategic plan. The Office of Planning and Analysis (OPA) collects, tracks, and regularly presents these verifiable metrics. These data are presented in monthly Planning Council meetings where members consider the appropriateness of indicators and of the strategic plan targets for Core Theme Access. Institutional-level data on the access performance indicators are updated as new data are available and reviewed by University Council at least twice a year to track progress towards the access objectives. Additional data provided by OPA, Office of Admissions, Office of the Registrar, Division of Student Success, Office of Financial Aid, colleges and academic departments, units and program leaders are verified to inform the decision-making process and support assessment and improvement of Core Theme Access programs.

4.A.4   The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.

4.A.5   The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.

4.A.6   The institution regularly reviews its assessment processes to ensure they appraise authentic achievements and yield meaningful results that lead to improvement.

Existing programs and services, as well as initiatives being considered for implementation, are holistically aligned to accomplish core theme objectives. Requests for investments in new or existing access initiatives must propose how they will assess the extent to which the programs and initiatives generate outcomes that contribute to the success of students, faculty, staff and the larger institution and will directly or indirectly contribute to Core Theme Access and other core theme objectives. There has been a concerted effort to support strategies, small and large, with one-time investments that can become permanently funded if assessment shows that the program has been successful (and has demonstrated its alignment to the strategic plan). The annual strategic plan reports (2012, 2013, 2014, 2015, 2016) highlight strategies, budget alignment, and successes for Core Theme Access.

Assessment of programs and services directed at Core Theme Access occurs at multiple levels (unit, program, department, college, and university). Strategic plan goal updates are produced by OPA and discussed in PC meetings before they are presented to the University Council and broadly distributed through the PC webpage. Strategic planning and strategic plan objective prioritization are centralized in the PC, which reviews the goal updates in each core theme, collects data from relevant groups in order to analyze strategic plan core theme objectives holistically, and sets priorities to inform budgeting in the next fiscal year. In this way, the integration of programs and services with respect to accomplishment of core theme objectives is ensured.

STANDARD 4.B – IMPROVEMENT CORE THEME ACCESS

4.B.1 **Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.**

4.B.2 **The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.**

The MSU Strategic Plan identifies 12 meaningful indicators (see Standard 1, Core Theme Access Table) of achievement of progress towards MSU's two Core Theme Access objectives. These indicators are used for improvement, to inform planning and decision making, and to direct the allocation of resources. These indicators and additional program specific indicators are used to improve the specific strategies (examples detailed below) that support access. Data on these indicators are tracked by OPA, by the several Student Success Division offices, and by the units who initiate strategies to support, improve, or refine programs that support Core Theme Access. University-level metrics are posted on the PC, OPA, and strategic plan webpages, and program-level assessments are published and appropriately distributed through posted assessment and/or annual reports.

One of the most measurable attributes of access is enrollment. MSU has identified the need to continue to increase the number of entering freshmen, increase the number of transfer students, and increase the diversity of the student body. The Strategic Plan explicitly highlights Native American students, other underrepresented race and ethnic groups, non-traditional aged students, and international students. The planning process also identified mechanisms to increase access, including growth in online and distance education and meeting student financial need. In order to maintain continued growth, implementation and directed support of specific programs have been identified through the planning and assessment process.

All access performance indicators are designed to provide meaningful measurements of achievement that provide guidance on plans for improvement. Data and positive impact stories are valuable means of informing planning, decision making and eventually allocation of resources to continue successful projects. Core Theme Access is addressed in many different departments across the university. Because improvement of the Core Theme Access indicators can be advanced in many ways, there have been several initiatives that have directly or indirectly had positive impacts on Core Theme Access objectives.

Core Theme 5 Access: Examples of Strategies and Programs

The following examples describe in greater detail some of the strategies and programs that are focused on the Core Theme Access and that contribute positively to achieving Core Theme Access objectives. Many programs that contribute positively to Core Theme Access cross over with those offered in support of Core Theme Learning. Each example indicates the Core Theme Access objective identifier(s) most closely associated with the strategy or program.

Admissions Initiatives (A1-A2)

The Office of Admissions is committed to collaborating with other MSU offices and programs to ensure that MSU's ambitious undergraduate student enrollment goals are met and access is provided to students from a wide array of backgrounds. Programs identified by the Office of Admissions to target students from within and outside of Montana; freshmen, transfers and non-degree undergraduate students; nontraditional age students; Gallatin College students; underrepresented minority students including Native American students; and international students are all consistent with Core Theme Access planning.

The Office of Admissions plans three years in advance to construct an enrollment pipeline that enables Montana State University to meet enrollment goals and realize many of the access objectives stated in the MSU strategic plan. This student recruitment pipeline is robust and includes students from throughout Montana and the rest of the nation from many under-represented groups, of various ages and from a wide variety of backgrounds. Figure 4.12 shows the increase in freshmen enrollment since 2008.
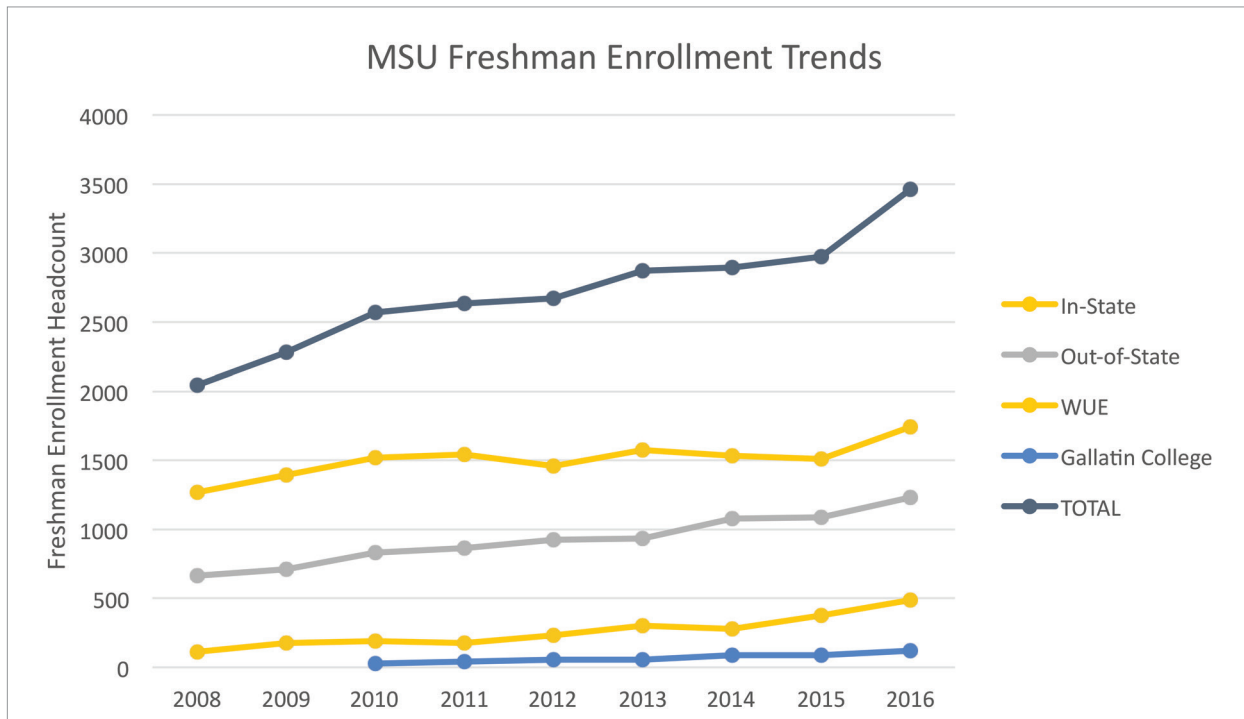

Figure 4.12: Increases in Freshman Enrollment
(In = in state; out = out of state; WUE = Western undergraduate exchange, GC = Gallatin College; Total = Total freshmen enrollment.)

The MSU enrollment management committee continually reviews data, studies trends and evaluates outcomes throughout each recruitment cycle. Mid-course corrections are frequently implemented if MSU appears to be falling short or coming in above projected targets. The Enrollment Management Committee meets weekly and includes representatives of Student Success (usually the director or vice president), the Registrar, Financial Aid, Budget, Administration and Finance, Office of Planning & Analysis, Provost, Honors College, Auxiliary Services, Housing, the Allen Yarnell Center for Student

Success, International Programs, Graduate School, and Admissions. Each year, improvements are made that help MSU to achieve enrollment targets in the Core Theme Access while also underpinning student success outcomes in the Core Theme Learning.

Major improvements are vetted by the MSU Enrollment Management Committee. A good example includes the decision to optimize nonresident tuition revenue effective fall 2017. This change will enable MSU to generate more revenue from fewer nonresident students. In the past, the university offered discounts based solely upon test scores, which was determined by assessment to be limited in its application. In response to these analyses, effective fall 2017, MSU's new student scholarship approach is more holistic and considers test scores, GPA and class rank. This change should lead to a more diverse incoming class, which will be assessed with other outcome indicators.

Specific strategies that MSU Admissions staff have employed to address core theme outcomes include:
- Providing access to students from a wide range of backgrounds and abilities by following the Montana Board of Regents admission requirements, which are relatively open in nature;
- Training all admissions staff members on MSU's commitment to diversity and inclusivity;
- Visiting schools, attending college fairs, hosting events, and providing outreach throughout the nation to people from all backgrounds;
- Hosting on campus recruitment events (MSU Fridays and daily visits) in an attempt to make all feel welcome. Sessions on MSU's commitment to diversity are included at all MSU Fridays;
- Work in collaboration with campus partners to provide specialized orientation sessions for Native American students, international students, nontraditional age students and veterans; and,
- Ensure that recruitment publications include visual representations of MSU's diversity.

Specific activities designed for Native American students:
- High school visits to all reservation high schools in Montana every year to meet prospective students and provide contact with high school faculty and staff;
- Visits to all Montana Tribal Colleges every year to meet prospective students and provide contact with Tribal College faculty and staff;
- Creation and distribution of Native American specific publications (visit poster, freshman and transfer checklist);
- Annual participation in the Montana Post Secondary Educational Opportunities Council Tribal College Fairs to promote transfers to a four year Montana institution;
- Campus visit programs scheduled for Native American specific groups including meetings with Admissions, campus tours, departmental meetings, and scheduled time with Native American specific departmental resources;
- Correspondence and scheduling of Native American groups to attend any of five MSU Friday programs;
- Native American specific counselor packets sent to Montana and regional counselors informing of Native American specific programs and resources available at MSU;
- Targeted electronic communication to Native American students periodically throughout the recruitment cycle; and,
- Promotion of the Tribal Homelands Scholarship program.

Liberal Studies Online Degree Completion Program (A1)

Liberal Studies has developed an online degree completion program designed for students who have completed at least two years of college and would like the opportunity to earn a bachelor's degree online. Since its inception in 2012, there has been a steady growth in enrollment (Figure 4.13). This program specifically addresses Core Theme Access by providing an opportunity for students based in rural areas to complete their degree without relocating to Bozeman. MSU's degree completion program is interdisciplinary, which supports Core Theme Integration as well. Students complete credits in four main subject areas: arts, humanities, natural science and social science. Online classes cover a range of subjects, including earth sciences, Spanish, sociology, history, photography, nutrition and political science.
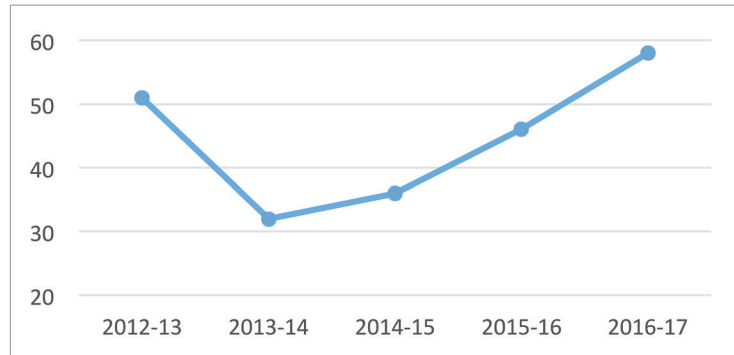

Figure 4.13: Number of students admitted per year

Assessment of the participating student body shows that this program also supports non-traditional students. Students in the program are on average age 37 years old. The age range for all students ever admitted to the program is 18 – 75 years, and the age range for the graduates at semester of graduation is 23 – 62 years. In a student survey, the primary motivation that students identified for enrolling in the program were completing a degree, life-long learning, and career advancement. Furthermore, in response to student interest, program improvement has resulted in an increase in courses offered since 2012 (Figure 4.14). The slight decline in courses offered in 2016-17 was due to a change from a self-support budget model to the program being base funded; the courses offered will increase in the future to support the growing number of students.
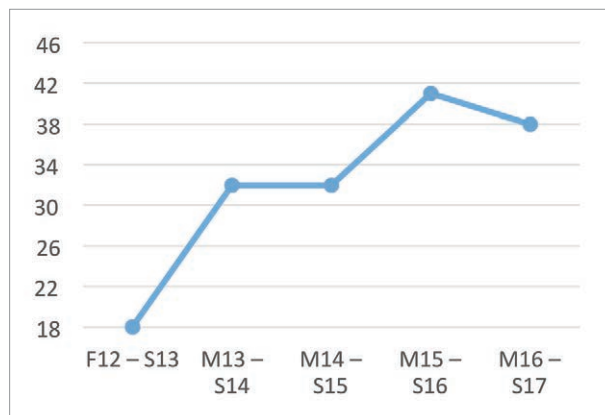

Figure 4.14: Number of Liberal Studies online classes offered

Institutional Support of Online Instruction (A1)

MSU is committed to supporting course development and instructional support to faculty ensuring a quality online education. In 2011, MSU launched an awards program to honor the university's top faculty who teach online. The MSU Excellence in Online Teaching Award, which is presented by the MSU Provost, goes to individuals who have provided outstanding teaching, course development, mentoring of students, and service to online education. Candidates are nominated by online students and reviewed by the MSU Online Advisory Committee, including a student representative. The award recognizes those who have made significant contributions to credit or noncredit programs through inspirational online teaching. In the seven years since its inception, the award has gone to faculty in four different colleges: Agriculture, Education, Engineering, Letters & Science and Nursing.

Hilleman Scholars (A2)

The Hilleman Scholars Program is a pilot effort testing the impact of individually tailored support and intervention strategies with at-risk undergraduate students to benefit program participants and develop strategies and approaches adaptable and scalable to larger student cohorts. The program combines academic and financial assistance with incentives to keep students engaged and on track to graduate in four years.

It begins with a month-long Summer Success Academy, an intensive summer bridge program after the students graduate from high school, which is designed to boost college-level math, writing and critical thinking skills and equip students with effective learning strategies. The intensive academic personal support and engagement continues for MSU Hilleman Scholars throughout their college careers. Beyond access to top faculty, this support includes tutoring, mentoring, career advising and more. By their third year, Hilleman Scholars are expected to pass this support on by serving as mentors and tutors to new students. During the school year, Hilleman Scholars are required to engage in 10 hours per week of structured activity designed to help them gain an understanding of how to be a successful student, intern or employee. Working at the intersection of learning and development, the focus of these experiences shifts each year as students progress through college.

In order to gain a better sense of which efforts work best in MSU's specific environment, the university measured differences in first semester outcomes between MSU Hilleman Scholars and a matched pair of comparable undergraduates. In almost every instance, the MSU Hilleman Scholars outperformed their peers for the first semester in different comparison groups (see table 4.10).

Table 4.10: Comparison of Hilleman Scholars to Match-Pair Cohorts

Comparison Attribute or Measure	2016 Match-Pair Cohort (n=97)	2016 Hilleman Scholars (n=50)	Difference
First Semester GPA Average	2.31	2.69	+ .38
Earned to Attempted Credit Ratio	69%	80%	+ 11%
Fall to Spring Retention	73%	88%	+ 15%

The Hilleman Scholars Program serves as the most recent example of MSU's approach to focused advising with distinct student populations. Other groups that receive specialized advising include: athletes, honors, and non-degree and undeclared students. The College of Engineering supports a specialized peer-advising effort. Also, the campus is currently drawing on the Hilleman effort to develop the "Sophomore Surge" (see Core Theme 1 Learning) advising effort for 1000 incoming first-time full-time students entering MSU Bozeman for fall 2017.

TRiO (A2)

The TRIO Student Support Service (SSS) program at Montana State University - Bozeman is committed to increasing the rates of academic achievement, retention, and graduation among historically underrepresented students. This is accomplished by providing holistic and individualized support services that maximize students' innate abilities and draw upon available resources within, and outside of, the University to benefit students, families and the larger community. In addition to supporting the attainment of MSU's strategic goals, an emerging role of the Allen Yarnell Center for Student Success (AYCSS) is focused on improving the interplay between access and excellence for students who are least likely to graduate.

The AYCSS has supported the Core Theme Access by submitting and receiving a TRIO SSS grant in 2013. To compete for this grant, MSU conducted detailed data analysis on the student population defined as "disadvantaged" using the US Department of Education definition (first generation, disabled, or low income). The analysis of this data provided strong support for the need of improved services for disadvantaged student populations. As with all initiatives, performance indicators are developed and assessed, which in turn direct the activities of the grant. Assessment and evaluation is designed to promote high quality, effective services, and continuous improvement to the MSU TRIO SSS program, ensuring its ambitious and attainable program objectives are met. For purposes of evaluating the MSU TRIO SSS program, an external evaluator will be hired to provide unbiased review of key programs, processes and outcomes. The evaluation process will consist of:

- Determining program, process, and events for evaluation;
- Developing guiding evaluation questions;
- Designing the evaluation – including methods;
- Implementing the evaluation collecting information, analyzing and interpreting the findings;
- Reporting on the findings; and
- Where appropriate re-evaluating the programs or processes to ensure program growth and improvement.

Gallatin College (A1)

Gallatin Valley residents first experienced the benefits of professional and continuing workforce education in 1996, offered by MSU-Great Falls College of Technology (COT). In 2004, at the request of the MSU President, an extension operation began providing developmental education coursework to serve primarily MSU students seeking Bachelor's degrees in Bozeman. In May 2010, the Montana Board of Regents authorized MSU Bozeman to offer Certificate and Associate Degrees and two-year education services at Gallatin College. In 2013, Gallatin College submitted to the Board of Regents a Comprehensive Two-Year Mission Expansion Plan. In the comprehensive development of Core Theme Access, Gallatin College was assigned specific performance indicators for assessment. Development of this plan was in response to increasing student enrollments and community interest, which called for a more local organizational structure.

The transition to MSU in August 2010 allowed Gallatin College to move its faculty and staff into the heart of the MSU campus, which positively impacted developmental students utilizing academic development center support. Starting in fall 2012, Gallatin College implemented the general education transfer mission by offering the Associate of Arts and Associate of Science degrees. Also that year, a majority of AA/AS classes were moved to a leased space on the Frontage Road along with the new CNC Machining CAS Program. As of fall 2017, Allied Health, Bookkeeping and Business Management CAS Programs will be offered at the expanded lease space at the Frontage Road, along with the new IT Networking CAS Program. Nearly all these courses are offered in the evening to accommodate student work schedules.

As of fall 2016, the college enrollment (headcount) had grown to 474 degree seeking students and 887 developmental education students. These students are served by 17 full time tenure track faculty, 40 adjunct faculty and eight staff members.
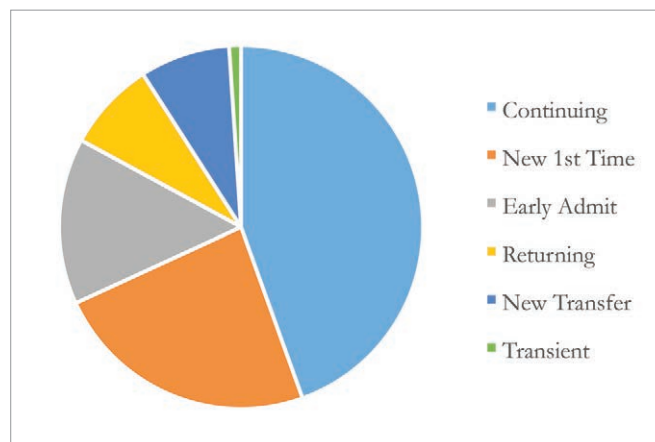

Figure 4.15: Student Types, fall 2016

Of degree-seeking students enrolled in fall 2016 (see Figure 4.15), 211 students (45%) are continuing, 112 are New 1st time, 70 are Early Admit, 38 are returning, 38 are New Transfer, and 5 are Transient.

University Studies (A1)
One of the objectives of University Studies is to contribute to a successful first year for MSU undergraduates. This process starts before the first day of classes through the orientation for freshmen students. Through professional academic advising and high-quality seminar instruction, University Studies specifically help students understand the possibilities and responsibilities of the academic experience through an exploration of their interests and goals and the development of intellectual knowledge and skills. Programs through University Studies are assessed and refined to improve outcomes on a frequent and regular basis.

First year seminar (US101US) and Introduction to Public Speaking (COMX111US) represent CORE University Studies Seminar classes that are required for all MSU students. The number of students who continue to be impacted by these courses matches the continued enrollment increases. It is imperative that these courses keep up with the increasing number of students

while maintaining the quality of programs. These programs and courses are designed to create a supportive environment so students can take an active role in their education. These small seminar format classes are student-centered and student-driven. As an interdisciplinary course, US101US offers opportunities for students to pursue meaningful answers to important provocative questions. US101US engages students in academic discourse that involves developing communication skills formally and informally, developing and expanding critical thinking skills, writing academically in a thoughtful manner, and engaging in research. COMX111US covers the fundamentals of effective individual and group public speaking. This course is structured to encourage open communication skills, with the objective of providing students with the basic skills to critique themselves so they can improve their public speaking ability throughout their professional life.

Caring For Our Own Program (A2)

Through the process of comprehensive planning for Core Theme Access, performance indicators were designed to assess programs that positively affect the diversity of the student body, and specifically increase Native American enrollment. An excellent example of the process of core theme planning, leading to assessment and improvement is the program that is designed to help Native Americans succeed in nursing. MSU's Caring For Our Own Program (CO-OP) recently received a grant from the Indian Health Service worth $332,715 a year for three years. The funds will enable the program to support several additional students: CO-OP was previously supporting 21 students over three years, and with these funds it will be expanded to support 27 students over three years.

In the nearly 20 years since its inception, CO-OP has successfully reduced the ethnic disparity within the MSU College of Nursing. The assessment goal of this program has been to match the percentage of Native American students enrolled in the College of Nursing to the percentage of Native Americans in Montana, 6.5 percent. Through careful analysis, program planning, and implementation, Nursing has nearly reached that goal. Assessment of this program continues to show success. With more than 6% of nursing majors identifying as Native American, the College of Nursing leads the campus community in representative enrollment.

Spotlights

Diversity and Inclusion Planning (A2)

MSU is committed to fostering diversity in race, gender identity, age, language, socioeconomic status, religion, political affiliation, sexual orientation and geographical background. In AY 2016-2017, MSU held two summits with a broad representation from the campus to develop a Diversity and Inclusion Framework. This framework contains a statement and vision, and five goals and associated strategies that, once implemented, will serve as a guide toward making the campus more inclusive and contribute to the overall strategic planning process in AY 2017-2018.

Veteran's Services (A1)

In 2011 the MSU Veteran Support Center opened. The function of the center is to certify eligible recipients for veteran education benefits, assist in program advising, and educate veterans on their rights and responsibilities. It also provides information and referral services, offers tutoring sessions and computer facilities, and hosts veteran-oriented seminars and guest speakers. The center serves as a site for drop-in support groups for veterans, as well as a place for veterans to gather. In addition,

there are resources for faculty and staff interested in learning more about veteran issues. In 2016, MSU was recognized in the top ten percent nationally for universities that serve the needs of veterans, and was the top-rated university in Montana.

Return-To-Learn Program (A1)

This retention and graduation initiative is designed to invite and support former students who have not earned their degree to return to MSU and graduate. In 2013 the Return to Learn program, housed in the Allen Yarnell Center for Student Success, was funded through the Strategic Investment Proposal process. In that same semester, activities began which included program development and marketing targeted to former MSU students who left without a degree. Return-To-Learn is designed to help students negotiate the re-entry process and provide resources that serve to improve their academic performance.

New Student Scholarship Approach (A1)

Unmet student financial need is one of the key drivers of student attrition, and it is a factor that the university is especially sensitive to in a low income, high need state like Montana. The Updating Scholarship Administration group began meeting in November 2014. The group's goal was to improve the campus' capacity to match, track, and communicate awards by identifying appropriate scholarship management software and aligning processes in support of optimized scholarship fund usage, efficient scholarship administration and enhanced donor relations. Improvement in these areas is critical to mitigate the impact of unmet student financial need. See Core Theme 1 Learning for more details.

CORE THEME 6: STEWARDSHIP	
Description:	As a public institution, MSU recognizes and honors its obligation to the many constituents who invest their time, financial resources, energy and support. MSU deeply values the public trust granted to it and is committed to continued good stewardship of its resources.
Goal Stewardship (S):	As steward of a land-grant institution, MSU will responsibly manage its human, physical, economic and environmental resources in an open and sustainable manner.
Objectives:	S.1: Human Resources: Attract, develop and retain the best faculty and staff to achieve the MSU mission. S.2: Physical Resources: Enhance aesthetic appeal and functional quality of MSU physical resources to support high quality learning, research and work environments. S.3: Economic Resources: Increase and effectively allocate resources in support of the MSU strategic plan. S.4: Environmental Resources: Promote sustainable stewardship and a culture of resource conservation at MSU.

MSU's success rests squarely on the dedicated people who have efficiently transformed the investment of the students and their families, taxpayers, donors, and grantors into academic and support programs of the highest quality. Continued wise stewardship is crucial to retain and recruit excellent people, maintain and improve physical infrastructure, continue to effectively raise and efficiently invest funds, and minimize negative environmental impact on Montana, the "Last Best Place". MSU has efficiently and effectively stewarded its human, physical, economic, and environmental resources for many years. Moving forward requires appropriate investments paired with careful management in each of those areas to maintain quality and make progress toward the core themes of learning, discovery, engagement, integration and access in the strategic plan.

As with all of the core themes, assessment, decision-making, and improvement are overseen by the highest administrative levels (University Council and the President) and governed by the collaborative institutional planning process described in Standard 3. The leaders in assessment for stewardship are Human Resources, Administration and Finance, Budget Council, the MSU Office of Sustainability and Campus Sustainability Advisory Council, and the Facilities Advisory Committee; all the groups and offices that with the assistance of OPA evaluate data and review assessments, recommendations, and observations from faculty, departments, programs and units around campus.

The Core Theme Stewardship timeline below (Figure 4.16) provides a broad overview of the assessment and improvement process for stewardship, and the narrative that follows provides a description and evidence to illustrate how MSU meets the standards for assessment and improvement. First, Standards 4A and B are addressed; second, evidence to support those standards are offered in the form of examples that outline the assessment, planning and improvement process as it operates for selected programs that address stewardship objectives; and third, featured spotlights that document MSU's commitment to stewardship are provided. Of special importance for stewardship is the effort to remain competitive in the recruitment and retention of faculty at MSU.
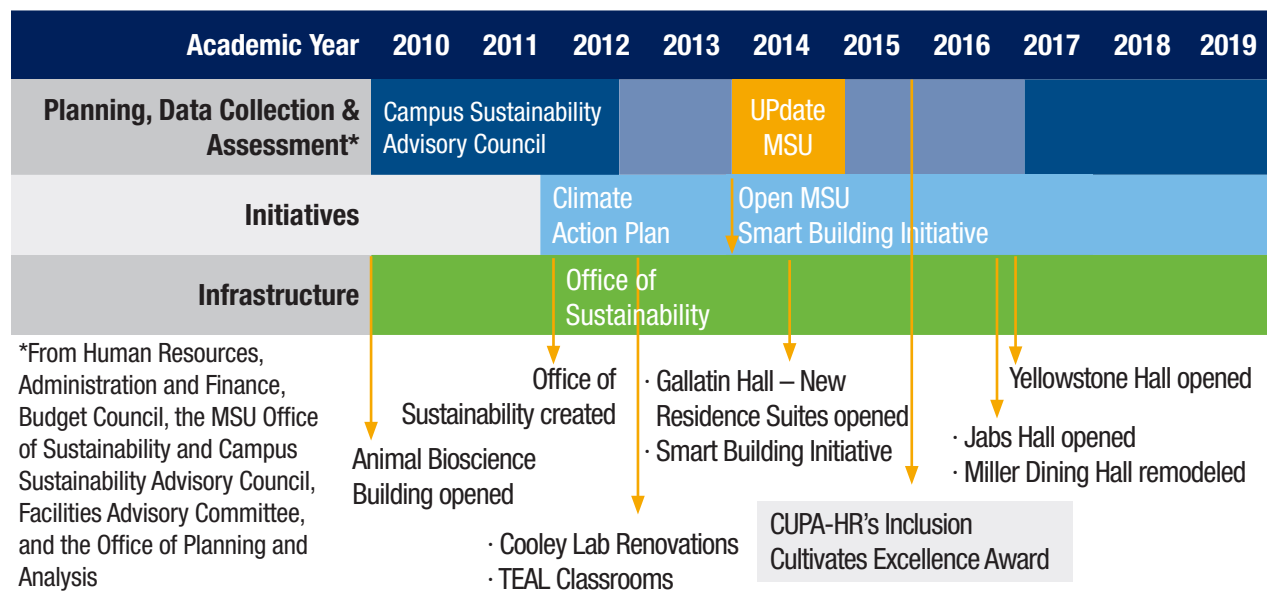

Figure 4.16: Core Theme 6 Stewardship timeline

STANDARD 4.A – ASSESSMENT CORE THEME STEWARDSHIP

4.A.1 The institution engages in ongoing systematic collection and analysis of meaningful, assessable, and verifiable data—quantitative and/or qualitative, as appropriate to its indicators of achievement—as the basis for evaluating the accomplishment of its core theme objectives.

4.A.2 The institution engages in an effective system of evaluation of its programs and services, wherever offered and however delivered, to evaluate achievement of clearly identified program goals or intended outcomes. Faculty have a primary role in the evaluation of educational programs and services.

4.A.3 The institution documents, through an effective, regular, and comprehensive system of assessment of student achievement, that students who complete its educational courses, programs, and degrees, wherever offered and however delivered, achieve identified course, program, and degree learning outcomes. Faculty with teaching responsibilities are responsible for evaluating student achievement of clearly identified learning outcomes.

MSU engages in the systematic and meaningful collection of data that informs planning, assessment and improvement to move MSU towards the objectives outlined for Core Theme Stewardship. Data collection and analyses are ongoing, systematic and meaningful and provide information to guide continued quality improvement of institutional programs and services. Institutional evaluation of effectiveness for Core Theme Stewardship is based on the performance indicators included as metrics in MSU's strategic plan. The Office of Planning and Analysis assembles, tracks, and regularly presents these verifiable data, to the Planning and University Councils (See Standard 1, Core Theme Stewardship Table). For example, these data are presented in monthly Planning Council meetings where members consider the appropriateness of indicators and of the strategic plan targets for Core Theme Stewardship. In addition, institutional-level data on the stewardship performance indicators are updated as new data are available and reviewed by University Council at least twice a year to track progress towards the stewardship objectives.

Additional data to inform the decision-making process and evaluation of various strategies for Core Theme Stewardship are provided by OPA; College and University Professional Association (CUPA) and Oklahoma State University (OSU) Salary Surveys; Center for Faculty Excellence and HR Professional Development & Training; Campus Planning, Design, and Construction; Facilities Services; Americans with Disabilities Act (ADA) Advisory Committee; Administration and Finance; OpenMSU; Climate Action Plan; and the Office of Sustainability.

4.A.4 The institution evaluates holistically the alignment, correlation, and integration of programs and services with respect to accomplishment of core theme objectives.

4.A.5 The institution evaluates holistically the alignment, correlation, and integration of planning, resources, capacity, practices, and assessment with respect to achievement of the goals or intended outcomes of its programs or services, wherever offered and however delivered.

4.A.6 The institution regularly reviews its assessment processes to ensure they appraise authentic achievements.

Existing programs and services, as well as initiatives being considered for implementation, are holistically aligned to accomplish core theme objectives. Requests for investments in new or existing stewardship initiatives must also propose how they will assess the extent to which the programs and initiatives generate outcomes that contribute to the success of students, faculty, staff and the larger institution and will directly or indirectly contribute to Core Theme Stewardship objectives. There has been a concerted effort to support strategies, small and large, with one-time investments that can become permanently funded if assessment shows that the program has been successful and has demonstrated its alignment to the strategic plan. The annual strategic plan reports (2012, 2013, 2014, 2015, 2016) highlight strategies, budget alignment, and successes for Core Theme Stewardship.

Assessment of programs and services directed at Core Theme Stewardship occurs at multiple levels (unit, program, department, college, and university). Strategic plan goal updates are produced by OPA and discussed in PC meetings before they are presented to the University Council and broadly distributed through the PC webpage. Strategic planning and strategic plan objective prioritization are centralized in the PC, which reviews the goal updates in each core theme, collects data from relevant groups in order to analyze strategic plan core theme objectives holistically, and sets priorities to inform budgeting in the next fiscal year. In this way, the integration of programs and services with respect to accomplishment of core theme objectives is ensured.

STANDARD 4.B – IMPROVEMENT CORE THEME STEWARDSHIP

4.B.1 Results of core theme assessments and results of assessments of programs and services are: a) based on meaningful institutionally identified indicators of achievement; b) used for improvement by informing planning, decision making, and allocation of resources and capacity; and c) made available to appropriate constituencies in a timely manner.

The MSU strategic plan identifies 14 meaningful indicators of achievement of progress towards MSU's four Core Theme Stewardship objectives. These indicators are used for improvement, to inform planning and decision making, and to direct the allocation of resources. These indicators and additional program specific indicators are used to improve the specific strategies that support the four stewardship objectives. Data on these indicators are tracked by OPA, Human Resources (HR), Administration and Finance and other operating units that have initiated strategies and collected assessment data to support, improve, or refine the strategic plan. University-level metrics are posted on the PC, OPA, and strategic plan webpages, and program-level assessments are published and appropriately distributed through posted assessment and/or annual reports.

4.B.2 The institution uses the results of its assessment of student learning to inform academic and learning-support planning and practices that lead to enhancement of student learning achievements. Results of student learning assessments are made available to appropriate constituencies in a timely manner.

As a public institution, MSU has been extremely responsive in assuring that improvements to the campus represent the many constituents who invest their time, financial resources, energy and support. At the heart of these efforts is the impact that stewardship will have on the educational

experience of students. The assessment of student learning, discussions about pedagogical theory, and a movement towards active learning for many programs on campus have informed classroom redesign (e.g. TEAL classrooms) and the use of space on campus. For example, renovation projects, common space redesigns, and new buildings now incorporate more collision spaces in order to encourage the exchange of ideas among students, faculty and staff. Further, MSU has closely monitored enrollment changes and used data to inform areas for human resource investment through employee growth and better compensation, especially to support curricular and co-curricular efforts. Targeted financial resource decisions are similarly data driven to save money, to increase funding from all sources, and to reinvest in support of strategic initiatives. Finally, environmental stewardship has been carefully planned and executed to minimize impact on the planet. As demonstrated in the narratives below, MSU has been a responsible manager of its human, physical, economic, and environmental resources and understands how care regarding these resources makes possible advancement towards objectives in the other core theme areas.

Core Theme 6 Stewardship: Examples of Strategies and Programs

The following examples describe in greater detail some of the strategies and programs that focus on Core Theme Stewardship objectives. Each example indicates the Core Theme Stewardship objective(s) most closely associated with the strategy or program.

Merit, Market and Equity Faculty Salary Adjustments (S1&3)
MSU is committed to programs and projects that enhance and support the learning and working environment. One important area is the support of faculty merit- and market-based salary adjustments. As defined by BOR Policy on Salary Adjustment, campuses may elect to award merit salary increases to employees using funds for across-the-board salary adjustment or specific pools set aside for salary increases in targeted processes. Faculty merit increases are based upon evaluation of faculty performance in instruction, research, and service and outreach, and may be available to an employee who demonstrates outstanding performance in a recent evaluation indicating the employee is above the average rating established by the campus. Market increases are targeted to faculty members whose salaries are significantly below market averages for discipline and rank, generally due to historical raise discrepancies in the Montana University System that resulted in inversion or compression for senior or long-term faculty. Table 4.11 shows the annual investment in faculty salary adjustments and professional development since implementation of the strategic plan.

Since the last self-study and the adoption of the strategic plan, salary adjustments have raised the average faculty member's compensation both absolutely and in comparison to national peers in support of the strategic plan. In addition to merit and market increases specifically for faculty, MSU has instituted a Compensation Advisory Committee and improved its processes for raise increases for employees on other kinds of contracts. Moreover, MSU has instituted the Center for Faculty Excellence, hired an instructional designer and grant training coordinator to enhance professional development for faculty, staff and administration.

The institution is committed to maintaining all tenure and tenure-track (T/TT) faculty compensation to within 80% of the average of the Oklahoma State University Faculty Salary Survey benchmark for very high research institutions. To that end, market increase funding is calculated and awarded based on distance from the average. After market funding is allocated, a pool is established to address equity imbalances. Remaining funding is used for colleges to recommend merit increases.

Table 4.11: Annual investment in employee salary and professional development*

Year	Investment	Purpose
2013	$7,235,000	· Salary increases · Merit & Market Increases for faculty · Additional salary and research support committed to retain high achieving faculty · Professional Development investments · Improve administrative support processes
2014	$1,450,000	· Merit & Market Increases for faculty · Additional salary and research support committed to retain high achieving faculty · Professional Development investments
2015	$1,695,000	· Merit & Market Increases for faculty · Additional salary and research support committed to retain high achieving faculty and to support professional development and training for faculty and staff
2016	$2,740,000	· Merit & Market Increases for faculty · Additional salary and research support committed to retain high achieving faculty · New budget model strategic pools awarded for allocation in FY17 for strategic plan initiatives

*Source: Strategic Plan Progress Reports

Promoting Sustainable Stewardship and a Culture of Resource Conservation (S2&4)

Physical campus projects have been initiated to improve the aesthetic appeal and functional quality of MSU physical resources, which support high quality learning, research and work environments, and improve Montana State's environmental stewardship. Table 4.12 shows the financial investments at MSU over the last four years resulting in improvements in technology, energy efficiency and improved instructional spaces. For a complete list of projects completed, see Project Archives website).

Table 4.12: Investments in technology, energy efficiency, and upgrades to instructional spaces*

Year	Investment	Purpose
2013	$2,100,000	· Investments in technological, functional and aesthetic upgrades to classrooms · Support for initiatives from Office of Sustainability
2014	$3,550,000	· Additional funding committed to information technology improvements · Software and process changes to streamline hiring and other administrative processes · Investment in technological, functional and aesthetic upgrades to instructional spaces
2015	$4,850,000	· Budget commitment for information technology improvements · Investments in technological and functional upgrades to instructional spaces · Support of the Smart Building Initiative
2016	$2,200,000	· Utilities tunnel expansion to conserve energy and financial resources over time · Data center relocation to protect data resources · Budget commitment for covered bike parking pilot project to encourage alternative commutes

*Source: Strategic Plan Progress Reports

Emissions Reduction (S4)

MSU is deeply committed to its environmental resources stewardship objective by decreasing emissions and utility costs over time, the latter of which also supports our economic stewardship objective. Progress is measured using utility data with verification from the MUS Smart Building Initiative (SBI) and Auxiliaries energy performance contracts with McKinstry. Since 2010, MSU has invested $24 million in efficiency programs to reduce energy, water and operations waste. Figure 4.17 shows greenhouse gas (GHG) emissions over time based on an inventory conducted by Sightlines, a third party vendor. The figure shows a 17% decrease in GHG despite a 9% increase in square footage (GSF) and 32% increase in FTE since 2009.
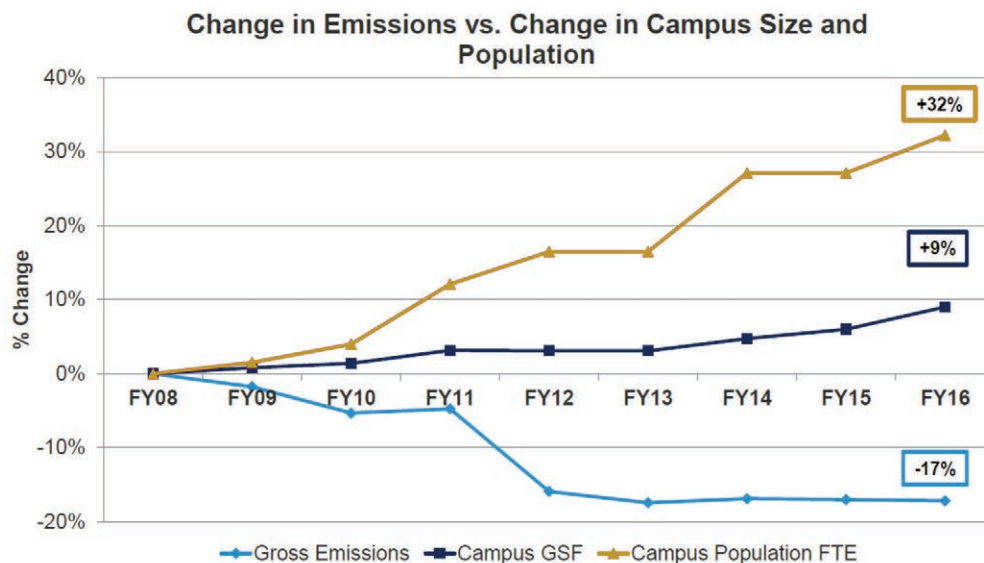

Figure 4.17: Change in Emissions vs. Change in Campus Size and Population (source MSU FY16 Emissions Report)

Comparing MSU's natural gas, water and electricity consumption today with that of 10 years ago, MSU is saving $1.8 million dollars annually despite the increase in space and population.

Investments in New Academic and Residential Facilities (S2).
Two recent projects are described below that exemplify efforts to enhance the functionality and environmental stewardship of major facilities.

Norm Asbjornson Hall: In early March 2014, MSU announced that alumnus Norm Asbjornson, a successful engineer and businessman, pledged $50 million for MSU's College of Engineering. Asbjornson's gift with a university $20 million match is funding the construction of an innovative laboratory and classroom facility that will enable interdisciplinary, hands-on learning and leadership. Groundbreaking occurred in September 2016. The gift also supports the fiscal stewardship objective by increasing resources from all sources in support of strategic plan objectives in core themes of Learning, Discovery, and Integration. Programming for the building was based on extensive planning and assessment of existing pedagogy, programs, and best practices.

New Dining Hall: In 2015, Miller Dining Commons was extensively renovated to enhance function, reduce waste, and accommodate enrollment and housing growth on campus. In partnership with academic programs, experiments to reduce food waste and improve nutritional outcomes were conducted for Miller Dining Commons that supported the interdisciplinary and integrative aspects of Core Theme Integration across academic and auxiliary functions. A second dining hall is currently under construction to continue to accommodate campus growth and the university's commitment to providing contemporary food options. The hall will have 700 seats and the capacity to serve more than 10,000 students daily and a million diner visits over the course of a year. With the addition of this dining hall, the university's Harrison and Hannon dining halls will both be used for different purposes in the future. Beginning in the fall of 2017, students enrolled in MSU's new culinary arts program will temporarily use Hannon Dining Hall for their studies. Eventually, Harrison Dining Hall will be converted into the permanent home of MSU's new hospitality management and culinary arts programs. This plan provides a win-win situation for both dining operations and academic programming, and underscores the impact of the strategic plan in all areas of campus planning.

Investments in Instructional Facilities (S2)
Two new Technology Enhanced Active Learning (TEAL) classrooms were completed and made available in 2013. Each room has five round tables and is equipped with technology. The design supports a new style of teaching that encourages students to teach each other and solve problems in a collaborative way. The room also has LCD screens on every wall, so that the classroom is able to shift focus to a specific group's work or the teacher's podium computer at any moment. This collaborative and active style of learning is similar to the way students will often solve problems in future jobs. With the increase in success rates of students taking classes in these two rooms, a third room with a capacity of 64 was created in fall 2015.

In 2014, classroom and adjacent support spaces at Linfield 231-231A-231B-231C and 231D were identified as being in less than desirable condition, no longer accommodating use by the Agricultural Economics lecture classes and the Agricultural Education demonstration and seminar classes. An

upgrade project combined all five spaces into a single larger flexible, TEAL-style classroom for up to 49 students with a modest storeroom. The storeroom houses reference materials and the AV equipment in a secure manner. Movable furniture, tables and chairs, allow quick rearrangement of the classroom for both lecture and group learning. Other classroom renovations occur annually and can be seen on the Campus Planning, Design & Construction (CPDC) website.

Investments in Research Facilities (S2)
Several renovation projects have focused on improving the functional space in research facilities for Core Theme Discovery, in support of objective D2 as well as S2.

- The Animal Bioscience Building (2011) is a 40,000 square feet three-story building that houses the Animal and Range Sciences Department. The building incorporates classrooms, teaching laboratories, conference rooms and offices. The project included the realignment and naturalization of a section of Mandeville Creek with a new pedestrian bridge over the creek.

- Cooley Lab (2012) was built in 1953 as a Medical Sciences Research Building, funded by the National Institutes of Health, and had little upgrading or renovation since that time. The laboratory design standards of the 1950s were no longer suitable for today's research needs. The building was inefficient, not accessible, and lacked the mechanical and electrical systems to support modern research. The renovation of the entire building was made possible with a grant from the National Institutes of Health through the ARRA economic stimulus recovery plan, with additional funding from MSU for a total budget of $17 million.

  The remodeled laboratories in the building were designed using a planning module to allow flexibility for research, support and storage spaces. Mobile casework allows for functional, expandable, changeable, and safe research environments. Fume hoods and bio-safety cabinets are provided throughout the facility. Special function laboratories and support rooms including centralized glass washing and sterilization and decontamination spaces, shared equipment labs, tissue cell culture labs, and shared cold rooms are part of the project. Shared equipment labs were supplied with emergency power and equipment monitoring that is integrated with the building systems. The design implements architectural, mechanical, electrical and civil concepts, and achieved certification as a LEED Gold building.

- AJM Johnson 221 completed on a computer lab renovation in October 2012. The project created a modular computer lab, with spaces for permanent computer stations, collaborative areas for multiple students to gather and study together, and lounge seating for between-class studying. An area was also available for practicing presentations, either for individual or group projects. The lab provides a high tech facility that is reconfigurable. It has an elevated floor to allow flexible network and wiring configuration. The slope into the room is ADA compliant. The furniture is also flexible.

- Plant growth greenhouse LED project is an effort to reduce greenhouse energy usage by installing new LED lights in the plant growth greenhouse. The LED lights replaced 1000 Watt high–intensity discharge (HID) lights. The new LED lights provide uniform light distribution without harmful hot spots. The lights run 70% cooler, eliminating plant damage and problems

related to unmanaged greenhouse temperatures (www.lumigrow.com). The new LED lights yield a 70% energy savings, contributing to fiscal and environmental stewardship.

Investments in Infrastructure (S2)
MSU Facilities Services and the University Information Technology combined on a fall 2012 project, which provided additional capacity for new computer servers and physical diversity for existing systems, added a level of redundancy to some of the systems currently located at Renne Library. University departments now locate their servers in this environmentally controlled atmosphere. These controls include security, fire suppression, air conditioning, and uninterruptable power systems.

- The Blackstone Charitable Foundation (2013) provided an expansion of its campus entrepreneurship program, Blackstone LaunchPad, to Montana State University as detailed in Core Theme Integration. With a physical presence at MSU in the Strand Union Building, it has a prominent location that is highly accessible and invites students to linger, mingle and share ideas. The space has been designed to inspire creativity, support collaboration, and foster connections between the faculty and students at the University, the business community and local entrepreneurs.

- The SUB Exit Gallery upgrades included new lighting, new finishes, a new door, and a new display for the hallway. The project is sponsored by ASMSU and showcases undergraduate students exhibiting their work from several fine art academic programs as well as external artists who contribute to the curricular and co-curricular experiences of students.

- Jake Jabs Hall (2014) earned LEED Gold certification from the U.S. Green Building Council. Its design is based on programmatic and sustainable goals. Jabs Hall is oriented with an east/west direction to maximize solar gain, and building materials are both functional as well as environmentally sensitive. The building contains passive solar walls and natural lighting with over 90% of regularly occupied space as daylight views. Local building materials, smart controls for lighting, heating and cooling, and water conservation regulators in all bathrooms and drinking fountains are found throughout the building. Last, but not least, the building has recycled countertops and backsplashes that began as a business class project then turned into a community event to collect glass for locally produced fly ash and recycled glass construction materials.

- Miller Dining Hall (2015) was recently remodeled and modernized as the first phase of a food service modernization. The remodel changes the way food is prepared and served. Food is prepared in the open rather than behind closed walls. This method of food service follows modern trends (see expanded description in "Enhancements in aesthetic appeal" above).

- Yellowstone Hall (2016), Montana State University's first freshman residence hall to be built in half a century, earned LEED Gold certification from the U.S. Green Building Council for energy-efficient and sustainable design and construction. The building's design is projected to reduce expenditures by significantly lowering the costs per square foot to heat, cool and light compared to most other residence halls on campus. The LEED certification process allows

MSU to verify, through a third party, that MSU is designing and constructing buildings to standards necessary to achieve that stewardship. Among other design features, Yellowstone Hall features beetle-kill pine wood boards throughout the building and a solar wall to pre-heat hot water and help the university lower its utility bill.

- The new Parking Garage, finished in 2017, is the first part of the South Campus Development, which will also include the Norm Asbjornson Hall (NAH) and related elements. Construction on the parking structure and the NAH are being staggered to minimize the impact on parking over the entire South Campus Development construction process. The new parking structure has 550 parking spaces, which will be a net gain of 150 spaces over those lost due to the construction of the NAH and the parking structure itself. The Parking structure has become a showplace for international and MSU-based artists, in an effort to enhance esthetics and integrate Discovery into projects that may have previously been seen as mundane. The "Art Park" effort engages visitors on campus with fine art and sets an interdisciplinary tone with the Engineering focus of neighboring Asbjornson Hall.

Spotlights

Inclusion Cultivates Excellence (S1,S3)
In 2015 MSU received College and University Professional Association for Human Resources' (CUPA-HR) Inclusion Cultivates Excellence Award for its ADVANCE Project TRACS initiative. Through Project TRACS, MSU has been able to implement policies and programs in support of faculty (especially women faculty), including a sick leave donation pool, a dual career community placement liaison, a faculty partner accommodation program and a family care program. The initiative also paved the way for institution-wide unconscious bias training, search committee training, the creation of a search committee toolkit focused on broadening the candidate pool and an equity advocate program. While initiated to increase the representation of women in STEM faculty positions, MSU has incorporated ADVANCE practices to the benefit of all employees.

The Office of Sustainability (S2,S4)
The Office of Sustainability is uniquely positioned to provide opportunities that incorporate and advance MSU's strategic plan because of its ability to use the campus as a living laboratory for sustainability. Started in 2011, the Office of Sustainability identifies and initiates programs until they can be institutionalized by MSU, through the planning and budgeting process. For example, now that recycling, compost and bicycle initiatives are successful and stable, continued assessment of these activities will lead to the next phase of examining purchasing policies and contracts to ensure that everything brought on campus can be reduced, reused or recycled. The Office of Sustainability is currently finishing MSU's first ever Sustainability Tracking, Assessment & Rating System (STARS) report through Association of the Advancement of Sustainability in High Education (AASHE). This is a national reporting tool used to measure baseline sustainability data and progress over time. STARS reports are updated every three years.

The Smart Building Initiative (S2,S4)

In 2014, MSU staff and students drafted a policy called the Smart Building Initiative, which was passed by the Board of Regents and extended to other MUS institutions. The Smart Building Initiative (SBI) provides an opportunity for MSU to invest money in projects designed to save energy and utility costs. SBI projects are evaluated by a steering committee consisting of faculty, staff and students, and projects are awarded on their ability to save utility costs. The SBI program also supports undergraduate mechanical engineering student internships. The student interns work side by side with facilities engineers and trades people through every step of the project, providing an exceptional opportunity for real world experience on mechanical systems, energy efficiency retrofits and return on investment calculations, supporting Core Theme Learning and Integration objectives. SBI interns are highly sought after upon graduation.

LEED Certification (S3,S4)

Yellowstone Hall is the fifth LEED-certified building on the MSU campus. MSU's Cooley Laboratory, which opened in October 2012 after a renovation, earned LEED Gold certification; a renovated Gaines Hall received LEED Silver in 2011; Gallatin Hall, a suite-style residence hall, received LEED Gold in 2015; and Jabs Hall, home of the MSU Jake Jabs College of Business and Entrepreneurship, earned LEED Gold in 2016.

Standard 5

MISSION FULFILLMENT, ADAPTATION, SUSTAINABILITY

ELIGIBILITY REQUIREMENT 24 – SCALE AND SUSTAINABILITY

Montana State University conducts ongoing assessment of available resources to ensure that operational scale is sufficiently matched to support its mission and achieve its core themes. MSU utilizes data-driven planning for budget allocation, which is evaluated against the mission and core themes, continually monitored, and adjusted to meet the ongoing and changing needs of the institution. The Montana State University 2016 Financial Statements (for FY ending June 30, 2016) and consistently strong bond rating reports reflect the operational scale and MSU's ability to fulfill its mission and core themes.

STANDARD 5: MISSION FULFILLMENT, ADAPTATION, AND SUSTAINABILITY

5.A Mission Fulfillment

5.A.1 The institution engages in regular, systematic, participatory, self-reflective, and evidence based assessment of its accomplishments.

The institution monitors its internal and external environments to determine how and to what degree changing circumstances may impact its mission, and its ability to fulfill that mission. MSU demonstrates that, when necessary, it is capable of adapting its mission, core themes, programs and services to ensure enduring institutional sustainability while maintaining its integrity as a land-grant university.

Core Theme Goals
As summarized in preceding sections of this report, MSU engaged in an inclusive, iterative, and public strategic planning process to develop a mission statement, identify six core themes to frame the aims of the institution, and articulate specific measures that provide evidence of performance and accomplishment.

Table 5.1: MSU Core Theme Goals And Objectives

Core Theme	Core Theme Goals and Objectives
1: Learning	MSU prepares students to graduate equipped for careers and further education.
	Objectives L.1: Assess, and improve where needed, student learning of critical knowledge and skills. L.2: Increase graduation rates at MSU. L.3: Increase job placement and further education rates.
2: Discovery	MSU will raise its national and international prominence in research, creativity, innovation, and scholarly achievement, and thereby fortify the university's standing as one of the nation's leading public research universities.
	Objectives D.1: Elevate the research excellence and recognition of faculty. D.2: Enhance infrastructure in support of research, discovery and creative activities. D.3: Expand the scale, and breadth, and quality of doctoral education.
3: Engagement	Members of the Montana State University community will be leaders, scholars and engaged citizens of their local, national and global communities, working together with community partners to exchange and apply knowledge and resources to improve the human prospect.
	Objectives E.1: Strategically increase service, outreach and engagement at MSU. E.2: MSU graduates will have global and multi-cultural understanding and experiences. E.3: MSU students, faculty and staff will have increased opportunities for leadership development.
4: Integration	By integrating learning, discovery, and engagement, and by working across disciplines, the MSU community will improve the world.
	Objectives I.1: Increase the integration of learning, discovery and engagement. I.2: Increase work across disciplines.
5: Access	Montana State University is committed to widening access to higher education and ensuring equality of opportunity for all.
	Objectives A.1: Educate more students while maintaining the quality of programs. A.2: Diversify the student body.
6: Stewardship	As steward of a land-grant institution, MSU will responsibly manage its human, physical, economic, and environmental resources in an open and sustainable manner.
	Objectives S.1: Human Resources: Attract, develop and retain the best faculty and staff to achieve the MSU mission. S.2: Physical Resources: Enhance aesthetic appeal and functional quality of MSU physical resources to support high quality learning, research and work environments. S.3: Economic Resources: Increase and effectively allocate resources in support of the MSU Strategic Plan. S.4: Environmental Resources: Promote sustainable stewardship and a culture of resource conservation at MSU.

Assessment of Accomplishments
Ongoing systematic, participatory, self-reflective, and evidence-based assessment of strategic plan progress occurs primarily, but not exclusively, in Planning Council (PC). Each year, PC assesses progress on core themes and considers environmental changes and campus activity changes to recommend a handful of objectives for prioritization in budget and program decision making. Once the President has approved the recommendations, they are posted to the PC website (2017 and 2018) and shared with governance councils and any other group on request. Strategic plan progress reports include budget alignment and success narratives and are regularly posted to the PC's website and presented to University Council (UC). The UC receives core theme updates throughout the year and at the end of the spring semester, each core theme is presented to UC with an update on strategic plan performance indicators (see Spring 2017 report). This keeps progress on the strategic plan visible to university decision-makers and the public on an on-going basis.

In addition to strategic plan performance indicators, PC and UC receive other regular reports on accomplishments from the Office of Planning and Analysis, University Budget Office, Academic Affairs, and various student support functions that also inform the direction of the university. The university submits several annual reports on enrollment, budget, expenditures, student success outcomes, research productivity, American Indian outreach and partnership efforts, and other activities to the Board of Regents of the Montana University System. Finally, individual units and campus-wide efforts, like OpenMSU, have created their own appropriate performance indicators to track progress in their strategic areas in alignment with the University's mission and core themes.

Academic units (colleges, departments, programs, centers and institutes) conduct regular assessment, and have reporting requirements during the annual review, program assessment, and budget cycles that also include self-assessment and evidence-based evaluation. Leadership, support, and administrative units similarly engage in systematic assessment and reporting through the annual review and budget cycle including data-based evaluation. These regular assessments are highly interconnected and provide the foundation for institutional planning and continuous improvement efforts.

2017 Year Seven Self-study Assessment – Summary of Quantitative Performance Indicators
As an institution of higher education, MSU strives for continued quality improvement in all its endeavors. The self-study process has given the university the opportunity to review institutional effectiveness that will inform future adaptations of the assessment and planning processes. MSU uses the results of ongoing assessment efforts to examine where and how the institution may be able to improve institutional effectiveness in the future.

MSU's definition of mission fulfillment is based on meaningful and measurable outcomes. Tables 1.2-1.7 in Standard 1 showed core theme goals, objectives, performance indicators, 2017 targets and results. For each performance indicator a 2017 target was identified, and mission fulfillment was defined as meeting 60 percent of all targets. For many performance indicators, data has been collected since the NWCCU evaluation in 2009-10. For some of the newer performance indicators, data points begin in 2011 or later. The tables below indicate whether or not the 2017 target was achieved. Trend data for all performance indicators are available in Appendix C.

Core Theme 1: Learning

Core Theme Learning has three objectives and ten performance indicators; the summary in Table 5.2 indicates that six of the performance indicators have met the 2017 targets. The trends since 2011-12 indicate that nine of the ten indicators have been moving in a positive direction.

Table 5.2: Core Theme 1 Learning: Performance Indicators, Target Status and Trends

Objective Identifier	Performance Indicators	2017 Target Status	Since 2011
L.1	Percentage of programs engaged in program assessment	Not achieved	↑
L.1	Percentage of Core 2.0 areas doing assessment	Target achieved	↑
L.2	Six-year graduation rate	Not achieved	↑
L.2	Graduate degrees awarded	Target achieved	↑
L.2	Doctoral degrees awarded	Target Achieved	↑
L.2	Associate degrees awarded	Target achieved	↑
L.2	Workforce certificates awarded	Target achieved	↑
L.2	First time full time freshman retention rate (entering cohort from prior Fall)	Not achieved	↑
L.3	Percentage of graduates employed in major/chosen field	Target achieved	↑
L.3	Percentage of graduates enrolled in graduate school (one year post-grad)	Not achieved	↓

Objective L.1 addresses MSU academic program assessment efforts. MSU has made considerable progress towards exercising continuous improvement in academic program and core student learning outcomes assessment. Yet, a continued focus on the assessment of student learning outcomes is needed and in fall 2017 the Assessment and Outcomes Committee will continue their work to achieve compliance in student learning assessment across degree levels and "close the loop" to achieve curricular improvement. This committee will systematically review, assess and offer feedback to academic programs on their assessment of learning outcomes processes.

MSU has moved in a positive direction since 2010 with many more programs initiating program assessment and academic departments and faculty members posting program learning outcomes on their departmental websites. One of the most important results of the learning outcomes assessment effort has been in the creation of a culture of assessment and continuous improvement. In addition to participating in structured reporting and formalized initiatives, individual faculty members are thinking more deeply about student learning objectives and how to assess them. For example, cross-curricular skills, such as critical thinking and communication, are now topics of conversation among faculty from different disciplines as they discuss how best to integrate those skills into their respective courses. While there are some gaps in the formal data reported, the outcomes assessment process is maturing to guide and focus efforts to continuously improve student learning.

Four of the six indicators of objective "L2: Increase graduation rates at MSU" were met, with increases in degrees awarded across all levels exceeding the targets set for this period. Learning targets were not achieved for two performance indicators, "six year graduation rate" and "first time, full-time freshmen retention rate." Although the 2017 targets for these indicators were not met, the trend results reported in Appendix C demonstrate that undergraduate graduation and retention rates have improved over time. These increases have occurred in an era of student enrollment growth at MSU, which means that MSU has maintained a positive trajectory for both indicators and increased the numbers of students who are retained and graduated. Standard 4 for Core Theme Learning documents the considerable investments in various student support initiatives that are meant to directly or indirectly increase freshman retention rates and graduation rates.

When the strategic plan was adopted, the university community understood that it contained ambitious targets. MSU has assessed progress each year in the aggregate and on specific programs. Having made partial progress, stakeholders recognize there is more to do. For example, Sophomore Surge, a program that was designed and is being implemented by the Campus Advising Action Team (CAAT), will provide peer mentoring and support services to freshman in an effort to help them "surge" into their sophomore year and to positively influence freshman retention rates. The program kicks off in Fall 2017, with an inaugural cohort of freshman, and an assessment plan and retention targets for those students have already been established. The CAAT itself is a new group that was developed based on the review and assessment undertaken as part of UPdate Advising, one of the work groups that was part of the UPdate MSU strategy in 2014-15. CAAT is an active group that is tasked with assessing and improving advising on campus.

One other performance indicator, "percentage of MSU graduates enrolled in graduate school," under the objective, "L3: Increase job placement and further education rates," was not achieved. Overall, the numbers of students enrolling and graduating are increasing, which suggests that while the percentage of students pursuing graduate degrees right after earning their Bachelor's degree has been decreasing, the actual number remains approximately steady with expected fluctuations based on the economy and the associated availability of employment opportunities. When opportunities in the workforce are available, more students enter the workforce rather than immediately pursuing graduate education. Planning Council has revisited this metric, but has retained this particular performance indicator because, along with percentage of graduates employed in major or chosen field, it provides a comprehensive measure of the objective.

Core Theme 2: Discovery
Core Theme Discovery has three objectives and 17 performance indicators; the summary presented in Table 5.3 indicates that 12 of the performance indicators have met the 2017 targets. The final column presenting trends since 2011-12 indicates that 13 of the seventeen indicators have been moving in a positive direction.

Table 5.3: Core Theme 2 Discovery: Performance Indicators, Target Status and Trends

Objective Identifier	Performance Indicators	2017 Target Status	Since 2011
D.1	# Tenure-track/tenured faculty	Target achieved	↑
D.1	# Faculty with national/international refereed scholarly products	Target achieved	↑
D.1	Academic Analytics average faculty percentile	Not achieved	↔
D.1	# National and international awards and honors earned by faculty	Target achieved	↑
D.1	STEM R&D expenditures Carnegie "rank"	Not achieved	↑
D.1	Non-STEM R&D expenditures Carnegie "rank"	Target achieved	↓
D.1	Science and engineering research staff Carnegie rank***	Not achieved	↑
D.1	Doctoral conferrals Carnegie rank***	Not achieved	↑
D.2	Funding for capital projects from public and private sources	Target achieved	↑
D.2	Grant-sponsored investment in centers, core facilities and resources	Target achieved	↑
D.3	Percentage of faculty who advise doctoral students (T/TT/NTT)	Target achieved	↑
D.3	Graduate student headcount	Not achieved	↑
D.3	Doctoral student headcount	Target achieved	↑
D.3	Graduate Degrees Awarded	Target achieved	↑
D.3	STEM Masters and Doc Degrees Awarded	Target achieved	↑
D.3	All Doctoral Degrees Awarded	Target achieved	↑
D.3	The number of faculty scholarly products co-authored/presented with graduate students	Target achieved	↑

MSU has met targets for increasing the number of tenured and tenure track faculty, and has experienced increases in faculty productivity in the form of refereed scholarly products and in the number of awards. In support of discovery activities, MSU has invested in capital projects and continues to be awarded research dollars that can be invested in research infrastructure on campus. Additional targets achieved include positive trajectories in graduate education with increases evident in the number of faculty advising doctoral students, doctoral student headcount and degrees, overall and STEM-based graduate degrees, and number of scholarly products co-authored with graduate students.

Of the five performance indicators that were not achieved, four were indicators of objective, "D1: elevate the research excellence and recognition of our faculty." Three of the targets not achieved were among the four rank measures comparing MSU to other institutions based on Carnegie categories. These rankings have been the focus of assessment by the Research Council, the University

Graduate Council and by ad hoc task forces on graduate education and research that reported recommendations for improvement to the Provost in late 2016. While three of the four Carnegie rank measures did not improve, MSU improved its rank in non-STEM R&D expenditures from 92 to 72 since 2011. This is an indication that MSU is supporting and improving research and creative activities beyond the STEM fields. A fourth indicator, the average faculty percentile rank in Academic Analytics, has been stable at approximately the 47th percentile since MSU started using this analytic tool in 2013-14. This measure is based in part on career longevity; in recent years MSU has hired record numbers of junior faculty in response to enrollment growth, so consistency in this measure is a positive outcome even though it is short of the target. The Academic Analytics measure balances the input focus of the Carnegie classification performance indicators (grants and staff) with scholarly outputs measured by publications, citations, and awards.

MSU also fell short of its 2017 target (see Appendix C) for one indicator of objective, "D3: Expand the scale, and breadth, and quality of doctoral education." The target for "graduate student headcount" has not been met, though graduate enrollment has increased since the last self-study. The fluctuation in graduate student headcount is largely a reflection of improvements in the economy and mirrors national graduate enrollment patterns. However, the drop between 2014-15 and 2015-16 is related to the larger than normal numbers of graduate degrees awarded in 2014-15, when MSU hit a high mark of 673 students earning a graduate degree. Through an assessment process, the graduate school identified students who were near completion of their degrees and then worked with departments to minimize obstacles that might be preventing students from successfully completing their degrees. An uptick in the graduate student headcount in 2016-17 was likely due to newly developed graduate student recruitment and outreach activities that are centralized in the Graduate School, improved collaboration between the graduate school and departments offering graduate programs, and new investments in graduate education including increasing stipends and making more fellowships available. These strategies are being overseen and assessed by the Graduate School and the University Graduate Council (UGC) and such ad hoc groups as the task force designed to assess and make recommendations about graduate education at MSU.

Core Theme 3: Engagement
Of the seven performance indicators for engagement, MSU has successfully met six 2017 targets. Core Theme Engagement has three objectives, and the university met all of the targets for "E1: strategically increase service, outreach and engagement at MSU" and "E3: MSU students, faculty and staff will have increased opportunities for leadership development."

Table 5.4: Core Theme 3 Engagement: Performance Indicators, Target Status and Trends

Objective Identifier	Performance Indicators	2017 Target Status	Since 2011
E.1	Establish campus-wide coordinating infrastructure for engagement, outreach and service	Target achieved	↑
E.1	Percentage of students, faculty and staff involved in service, outreach and engagement activities, with particular attention to underserved areas and minority populations	Target achieved	↑
E.1	Number of MSU service, outreach, and engagement activities	Target achieved	↑
E.1	Percentage of students actively participating in student organizations	Target achieved	↑
E.2	Percentage of students participating in cross-cultural study, work or service experiences.	Not achieved	↔
E.3	# of opportunities for leadership development and practice for faculty, staff and students (no data for students)	Target achieved	↑
E.3	% of students, faculty and staff participating in leadership development activities (no data for students)	Target achieved	↑

Overall, MSU students, faculty and staff are increasing their participation in a variety of engagement activities. The one indicator for objective, "E2: MSU graduates will have global and multi-cultural understandings and experiences," which measures students' participation in cross-cultural study, has remained unchanged over time at around 2.5 percent (See Table 1.4). This indicator tracks the percentage of students participating in study abroad; it has been stable in a time of increased enrollments, indicating more students have participated in study abroad. For this objective, MSU plans to increase student participation and measure more than just study-abroad programs. Planning Council has been interested in including domestic cross-cultural engagement, as well as work and service experiences that incorporate significant academic components, in this indicator. At this time, data collection for these broader engagement experiences has not yet been developed. Anecdotally, university administrators know these opportunities are increasing. For example, there is increased participation in College of Nursing clinical trips to the Fort Peck Reservation, Haiti, and Cuba.

When the strategic plan was adopted in 2012, the University acknowledged that some objectives were important and needed to be included despite being difficult to systematically measure. The effort to collect data on student, faculty and staff engagement activities has been challenging. Assessment by the Office for Planning and Analysis (OPA), the Planning Council, the Outreach and Engagement Council and the Office of Student Engagement indicates that the current measures do not fully reflect the engagement activities of students, faculty and staff. As discussed above, these groups are currently trying to identify improved measures or improved methods for collecting data on engagement activities.

Core Theme 4: Integration

Core Theme Integration has two objectives and six performance indicators; the summary presented in Table 5.5 indicates that five of the performance indicators have achieved the 2017 targets.

Table 5.5: Core Theme 4 Integration: Performance Indicators, Target Status and Trends

Objective Identifier	Performance Indicators	2017 Target Status	Since 2011
I.1	Percentage of students with substantial curricular experience that integrates learning, discovery and engagement (data not collected)	Neutral	↔
I.1	Department role and scope documents will include substantial integration of learning, discovery and engagement	Target achieved	↑
I.1	Number of community-based research projects	Target achieved	↑
I.1	Number of faculty scholarly products with undergraduate and graduate students	Target achieved	↑
I.2	Students completing interdisciplinary programs	Target achieved	↑
I.2	Interdisciplinary research and creative projects	Target achieved	↑

Within the Integration Core Theme, the only 2017 target not met was for the indicator "70 percent of students having a substantial curricular experience that integrates learning, discovery and engagement." Discussions have taken place in PC and in the UPdate Core group about how MSU might measure whether students are having this type of experience. Some students participating in service-learning courses or engagement activities as part of their curriculum are having an experience that integrates learning, discovery and engagement, but MSU currently does not have any way for students to report on this, nor does MSU systematically track classes that offer such opportunities. As with some of the Engagement performance indicators, the University knew that tracking integrative curricular experiences would be difficult, but the objective was nonetheless important to include in the strategic plan. PC will need to reconsider this particular indicator.

Core Theme 5: Access

Core Theme Access has two objectives and 12 performance indicators; the summary presented in Table 5.6 indicates that half of the performance indicators met the 2017 targets. The trends since 2011-12 indicate that ten of the twelve indicators have been moving in the right direction without meeting 2017 targets.

Table 5.6: Core Theme 5 Access: Performance Indicators, Target Status and Trends

Objective Identifier	Performance Indicators	2017 Target Status	Since 2011
A.1	MT Undergrad Headcount Enrollment (Fall)	Not achieved	↑
A.1	New Transfer Students (Summer and Fall)	Not achieved	↓
A.1	Graduate Student Headcount Enrollment (Fall)	Not achieved	↑
A.1	Online Credits (AY)	Target achieved	↑
A.1	Online Courses (AY)	Target achieved	↑
A.1	Gallatin College Headcount Enrollment (Fall)	Target achieved	↑
A.1	% Financial Need Met	Not achieved	↑
A.1	Total Headcount Enrollment (Fall)	Target achieved	↑
A.2	Native American Student Headcount Enrollment (Fall)	Not achieved	↑
A.2	Other Under-Represented Ethnicity and Race Headcount Enrollment (Fall)	Target achieved	↑
A.2	International Student Headcount Enrollment (Fall)	Target achieved	↑
A.2	Non-Traditional Age Student Headcount Enrollment (Fall)	Not achieved	↓

MSU prides itself on maintaining the land grant mission of providing access to higher education to the breadth of the population. The 2019 targets set during the implementation of the strategic plan in 2012 are bold and ambitious reflecting MSU's deep commitment to accesss. Increasing the Native American Student headcount by 60 percent bucks national trends. Increasing the headcounts of new transfer students by 37 percent and of non-traditional age students by 42 percent are difficult targets in an increasingly competitive market and an improving economy. The 2017 targets in the Mid-Cycle report also reflect these challenges. Despite falling short in these areas, the results in Appendix C demonstrate that MSU is increasing headcount enrollment in almost all of these areas, the only exception being non-traditional age student enrollment.

In Standard Four, Core Theme Access, MSU provides evidence of some of the investments that have been made to support access, including the aggressive work done by the Office of Admissions to recruit and provide access to students from a wide range of backgrounds and abilities. These efforts have focused specifically on improving Native American student recruitment, access, and success, principally because these students are part of the state's largest minority population. There are also new efforts (Hilleman Scholars, Sophomore Surge) to provide additional support to students who are at-risk of not being retained. MSU also helps at-risk and underrepresented students connect with each other, with other students, and with activities on campus, working toward a student body reflecting a wide range of demographic categories.

Core Theme 6: Stewardship

Of the 14 performance indicators for stewardship, MSU successfully met 12 of the 2017 targets. Core Theme Stewardship has four objectives; each corresponding to a different resource (human, physical, economic and environmental) that MSU, as a land-grant institution, strives to responsibly manage and respect.

Table 5.7: Core Theme 6 Stewardship: Performance Indicators, Target Status and Trends

Objective Identifier	Performance Indicators	2017 Target Status	Since 2011
S.1	Average staff salary compared to peer market	Target achieved	↑
S.1	Average faculty salary compared to peer market	Target achieved	↑
S.1	Average administrative salary compared to peer market	Not achieved	↔
S.1	Number of faculty and staff participating in professional development opportunities will increase	Target achieved	↑
S.2	% of classrooms with technology rated tier 3 or above	Target achieved	↑
S.2	% of classrooms with technology rated tier 2	Target achieved	↑
S.2	Increase accessibility to campus facilities (projects)	Target achieved	↑
S.2	Increase accessibility to campus facilities (investment)	Target achieved	↑
S.2	Develop and implement a comprehensive master plan	In Progress	↔
S.3	Align budgeting process with the MSU Strategic Plan	Target achieved	↑
S.3	Improve efficiency and effectiveness of mission support processes	Target achieved	↑
S.3	Fiscal resources in support of the MSU Strategic Plan	Target achieved	↑
S.4	Greenhouse Gas Emissions (MT)	Target achieved	↓
S.4	Diverted waste from landfill	Target achieved	↑

MSU's dedication to responsible stewardship is evidenced by the achievement of all the 2017 Targets for objectives related to economic resources and environmental resources. For stewardship of economic resources, it is also notable that in fiscal year 2017 a new budget model and process was implemented based on the work of the UPdate Budget Process workgroup. For stewardship of environmental resources, students, in particular, have been champions of recycling on campus by developing strategies and remaining committed to efforts to divert waste from the landfill. MSU has also improved existing facilities and constructed new efficient and accessible buildings to support the enrollment growth on campus.

Faculty and staff salaries have risen to 81 and 82 percent of the average in their peer markets, although the average administrative salary at MSU remains at 70 percent of the peer market average, below the 76% 2017 target (See Table 1.7). The Planning Council (PC) has identified S.1, "attract, develop and retain the best faculty and staff to achieve the MSU mission" as a priority objective in every year it has made recommendations. Administrators have prioritized faculty and staff salary increases, setting aside investment pools and creating salary review processes, resulting in progress for faculty and staff salaries, but administrative salaries are approved at the system level and are constrained by multi-campus market and budget forces. PC has again recommended a focus on objective S.1, human resources, for 2018. MSU remains committed to providing faculty and staff salaries that are competitive so that talented administrators, faculty and staff will be attracted to and retained at the university.

Developing and implementing a master comprehensive plan for stewardship of physical resources, is designated as "In Progress" as that action has been re-envisioned since the strategic plan was developed in 2012. Initially, a single plan was envisioned, which began with academic and student programming needs, and ended with the physical resources needed to achieve them. Since 2012, MSU faculty and staff have participated in incremental planning in complementary ways while relying on the existing Long Range Campus Development Plan (LRCDP, 2008), which focused on physical resources for overall guidance. Campus buildings, when MSU has been able to build new, are sited at physical locations identified in the LRCDP, and programming for new and renovated buildings is in alignment with strategic plan goals and objectives. In addition to building and renovation, physical planning efforts over the last seven years include transportation, bicycle, and climate planning. The University Facilities Planning Board reviews these plans at the outset of the planning process and at their conclusion.

5.A.2 Based on its definition of mission fulfillment, the institution uses assessment results to make determinations of quality, effectiveness, and mission fulfillment and communicates its conclusions to appropriate constituencies and the public.

Definition of Mission Fulfillment
MSU defines mission fulfillment as making progress towards the core theme goals defined in the strategic plan. In the Mid-Cycle Review, the university proposed a quantifiable way of determining the extent of mission fulfillment by setting targets for 2017, the year of MSU's Year Seven Accreditation visit. The 2017 accreditation targets, like MSU's 2019 Strategic Plan targets, were aspirational, and so the institution also tracks the trajectory of all numeric indicators to learn from trends over time. In MSU's Mid-Cycle Review, the university defined mission fulfillment as meeting 60 percent of these 2017 targets.

Table 5.8: Mission Fulfillment: Percentage of Overall Performance Indicators Met and Showing Improvement or Advancement since Implementation of the Strategic Plan

Core Theme	Number of Performance Indicators of Achievement	Number of Indicators For Which Targets Were Achieved	Number of Indicators Showing Positive Progress Under the Strategic Plan
Learning	10	6	9
Discovery	17	12	13
Engagement	7	6	6
Integration	6	5	5
Access	12	6	10
Stewardship	14	12	12
Total Number	66	47	55
Percent of Total		71.2%	83.3%

Mission Fulfillment Informed by Analysis of Accomplishment of Targets

Assessment of mission fulfillment is informed by an overall analysis of achievement of targets set for performance indicators across all the core theme objectives. Achievement on performance indicators for each of the six core themes are evaluated through direct quantitative and qualitative assessment in this self-study. MSU defined mission fulfillment in the Mid-Cycle Report as meeting or exceeding 60 percent of the total performance targets. **MSU has fulfilled its mission.** In fact, MSU has exceeded the target, as illustrated in Table 5.8, which shows that more than 71% of the 2017 targets were met or exceeded. This conclusion is fully supported by the trends since 2011-2012, which demonstrate positive progress on more than 83% of MSU's core theme performance indicators. While demonstrating mission fulfillment based on the core theme indicators is one positive outcome of this self-study process, the depth and breadth of MSU's commitment to fulfilling its mission is enriched and more fully reflected in the examples of strategies, programs and spotlights presented in Standard Four.

The analyses of the strategic plan core themes, goals, objectives and quantitative indicators are informed by both the targets that are achieved, as well as the performance indictors that are not achieved. The indicators that have not yet been achieved identify areas for further attention; they may also help the PC and other decision making groups at MSU to identify performance indicators that should be added, revised, or clarified to focus institutional attention on other important challenges, achieve further progress and more fully reflect the comprehensive and complex MSU enivironment.

MSU recognizes there are objectives and performance indicators that require further review and assessment. The Planning Council provides evidence-based input linking strategic planning with strategic execution, and facilitates the continuous evolution of the strategic plan through its advisory role to the President. To this end, future and continued review of MSU's performance indicators will be evaluated.

MSU is resolved to continually improve through assessment and planning. To this end, this section has shown conclusive evidence that MSU successfully "raised the bar" with exceptional progress in multiple areas. including some areas where targets were not met but planning and implementation of programs were informed by assessment (see Standard Four).

Communication to Appropriate Constituencies and the Public
The Office of Planning and Analysis publishes an annual Strategic Plan Progress Report that informs the campus and community on the University's core themes, goals, strategies, investments and accomplishments. The report also includes trends for performance indicators in key areas over time. The President includes a brief letter introducing the report and outlining the Planning Council's priorities. The report provides an opportunity to share the University's goals and successes and demonstrate its responsible stewardship and commitment to students, research and the many communities with which the institution partners. These reports are mailed out to deans, directors, and department heads, as well as to external constituencies including external college advisory boards, the alumni relations advisory board, MSU Friends of the Library, Bozeman City and Gallatin County Commissioners, Tribal Council Chairpersons, the Museum of the Rockies Board of Trustees, Tribal College Presidents and the Presidents and Chancellors of other public land-grant universities. The director of OPA provides monthly updates on progress towards strategic objectives to the Planning and the University Councils and makes these goal updates public on the Planning Council website.

The MSU Accreditation website posts documents pertaining to MSU's regional institutional accreditation including all reports from the current and the last accreditation cycles. Here the public is able to access the most recent reaffirmation letter, find links to the NWCCU website, review MSU's mission and core themes as well as find a list of the externally accredited programs with links to the accreditors and copies of their most recent letters of accreditation.

5.B Adaptation and Sustainability

5.B.1 Within the context of its mission and characteristics, the institution evaluates regularly the adequacy of its resources, capacity, and effectiveness of operations to document its ongoing potential to fulfill its mission, accomplish its core theme objectives, and achieve the goals or intended outcomes of its programs and services, wherever offered and however delivered.

As part of their assessment, planning and improvement functions, the Planning and Budget Councils consider and evaluate the adequacy of resources, capacity, and effectiveness of operations. In relation to defining and assessing the extent of mission fulfillment, MSU defines clear targets for performance indicators, and success moving towards these targets provides data for the formal assessment of the adequacy of resources, capacity and effectiveness of operations.

Immediately after the formal adoption of the strategic plan, the university budget office revised its year-old Strategic Investment Proposal (SIP) process to require that all budget requests align with strategic plan core theme objectives. The SIP process was led by Budget Council. The Council evaluated proposals and annual assessments based on their strategic alignment to core themes,

institutional benefit, and alignment with the Montana University System strategic plan goal of allocating 70 percent of institutional spending on instruction, academic support, and student services. The program proposals were required to very specifically address how they align with one or more objectives of the strategic plan. The SIP process was repeated in the fall of 2013. Over the next three years, funded proposals had to submit regular assessment reports which were reviewed and evaluated by the Budget Council. From those reports, Budget Council determined whether to continue funding, increase funding or discontinue funding.

The university has allocated resources in the form of one-time-only and base budget increases that are in alignment with the strategic plan through its SIP Process (described above) for purposes that include: extra sections due to enrollment growth; MUS system-level performance funding model; distance education faculty development dollars and faculty start-ups dollars. Additional activities in support of the university mission and core theme objectives included:

- planning for the Year of Engaged Leadership in 2013 to develop additional capacity and enthusiasm for outreach, engagement and leadership;
- Planning Council's strategic plan prioritization process which impacted budgeting in fiscal year 2017 and 2018; and,
- development of a new budget model implemented for fiscal year 2017 and refined for 2018.

The 2017 budget model included two pools for investment in strategic plan priority-related "small bets" and strategic results rewards for prior efforts that moved the university forward on strategic plan performance indicators. The 2018 process requested that units reallocate funding in support of strategic objectives, not just request new funding.

In aggregate, these efforts have directed millions of dollars into programs that align with MSU's strategic plan. Table 3.1 in Standard Three documents investments in support of core theme objectives since 2011. As evidenced by the totals at the bottom of the table, nearly 75% of these investments went to instructional and student success initiatives through the Office of Academic Affairs (Provost) and the Division of Student Success.

5.B.2 The institution documents and evaluates regularly its cycle of planning, practices, resource allocation, application of institutional capacity, and assessment of results to ensure their adequacy, alignment, and effectiveness. It uses the results of its evaluation to make changes, as necessary, for improvement.

Two critical improvements, the new budget model and the Planning Council's annual budget prioritization recommendations, provide evidence of how MSU evaluates its planning, practices, resource allocation, application of institutional capacity, and assessment of results to ensure their adequacy, alignment, and effectiveness. The institution's serious and ongoing efforts to incorporate continuous improvement through well informed data-driven planning and assessment of results have informed the design, implementation and assessment of a new budget model and a PC prioritization process that further institutionalizes assessment and planning into the budget cycle to benefit the strategic plan and core theme goals.

In fiscal year 2017, the new budget process and budget model were implemented based on the work of a task force. The budget process includes an 18-month timeline that allows the PC to gather information and set priorities that drive the next budgeting cycle. The budget model aims to:

- Provide resources for strategic priorities
- Provide incentives to reward progress toward MSU's strategic priorities
- Be dynamic, flexible and predictable
- Provide adequate time for campus units to plan for and execute tactical elements
- Provide transparency
- Enable effective decision-making at the appropriate organizational levels

As for the annual budget prioritization recommendations, the PC takes into consideration the mission, vision, and values of MSU and reviews progress on all strategic plan performance indicators and core theme objectives in order to:

- assess progress towards core theme goals;
- assess appropriateness of performance indicators and targets; and,
- develop and recommend budget priorities that will ensure that investments continue to align with core theme objectives and push MSU to successfully fulfill its mission.

The PC relies on the assessments and recommendations of committees, units, and task forces across campus as well as strategic plan indicators, to inform prioritization of core theme objectives for the following fiscal year.

2016 Planning Council's [Objectives Recommended for Prioritization in FY 2018](#)

Learning: L.1 – Assess, and improve where needed, student learning of critical knowledge and skills.
Discovery: D.1 – Elevate the research excellence and recognition of faculty
Discovery: D.3 – Expand the scale, breadth, and quality of doctoral education.
Access: A.2 – Diversify the student body.
Stewardship: S.1 – Attract, develop, and retain the best faculty and staff to achieve MSU mission

As the current strategic plan approaches its 2019 targets, the PC is engaged in the next pre-planning exercise. In the coming year, the PC will again review the most recent data available on all of the performance indicators, carefully review this self-study and NWCCU actions and recommendations, and examine which investments have achieved the greatest and least success based on assessment results. PC will conduct discussions with campus stakeholders to lay the groundwork for the next strategic planning process in a systematic, data-informed, thought-provoking set of dialogues informed by data collected and lessons learned over the past seven years.

The university has experienced a sustained pattern of enrollment growth since the last self-study in 2009 and a thoughtful cycle of planning, informed investment and assessment of results have helped build institutional capacity and ensure effectiveness. Annually, results of assessment are documented and used to make changes that will help build capacity in support of core theme objectives.

5.B.3 The institution monitors its internal and external environments to identify current and emerging patterns, trends, and expectations. Through its governance system it uses those findings to assess its strategic position, define its future direction, and review and revise, as necessary, its mission, core themes, core theme objectives, goals or intended outcomes of its programs and services, and indicators of achievement.

MSU monitors the internal and external environment as described throughout this self-study document. Established committees and councils, as well as ad-hoc working groups, use information on institutional performance, emerging external trends, market forces, and legislator and regent expectations to inform decision making to achieve the institution's mission as a land-grant university. MSU revisits its strategic plan, missions, core themes, objectives, and outcomes on a regular basis.

The last strategic plan was adopted in 2012, and the next strategtic planning effort will begin in the second half of 2017. All of the councils, employee and student governance groups, and members of the university and public were invited to participate in planning, assessment, and improvement throughout the last strategic planning cycle, and will be invited again to help develop the next plan.

MSU also demonstrated a commitment to the use of ad hoc groups to gather data on current and emerging trends and expectations in higher education that are used to inform institutional practices and programs. Recent examples documented in this self-study include UPdate MSU and OpenMSU. UPdate MSU is an institutional project composed of 11 working groups focused on improving and modernizing processes and organizational structures to better support students, faculty, and staff. The working groups explored and analyzed practices and improvements at other institutions to provide benchmarks with which to assess MSU processes and structures and identify areas for improvement. OpenMSU is an initiative that empowered staff and faculty to optimize mission support success through long-term, sustainable changes based on data collection, identification of obstructions and inefficiencies, exploration of exemplary practices at other institutions, and campus input.

As further evidence that MSU incorporates emerging patterns, trends, expectations and institutional performance into its assessment and planning efforts, this self-study has generated specific and important process and design considerations that will inform future planning and assessment efforts.

Lessons Learned and Paths Forward
Through the governance system, the institution will use the findings from this self-study to inform the next strategic plan and to review and, if appropriate, revise its mission, core themes, core theme objectives, intended outcomes of its programs and services, and indicators of achievement. Having gained critical insight, the Planning Council and the Office of Planning and Analysis have extended discussions around continuous improvement to ensure they support and inform the next accreditation cycle.

Already under discussion is the creation of a more evolved definition of mission fulfillment and refined performance indicators for the strategic plan, a better alignment of strategic planning with MSU's accreditation cycle, and the institutionalization of a more hands on Assessment and Outcomes Committee. In this cycle, the definition of mission fulfillment was quantitative and relied

on whether or not MSU was meeting specific targets for the performance indicators. The many individuals involved in writing the seven-year self-study found that the narrow definition left little room for additional quantitative and qualitative consideration of the diverse programs and strategies that the institution developed and assessed in support of its core theme objectives. Some of these programs are having significant success as measured by program performance indicators and will eventually impact core theme indicators, but do not necessarily have immediate, direct impacts on the institutional core theme performance indicators.

A better alignment of strategic planning with the accreditation cycle is already underway. The current strategic plan set targets for 2019, which did not coincide with our accreditation cycle. As MSU looks forward to a new strategic plan, the expectation is to sync strategic planning and institutional accreditation cycles.

The Assessment and Outcomes Committee, a group that has existed in its current form since 2013, is now providing feedback to units on academic program assessment. The progress towards 100 percent use of program assessment to inform and improve academic programs has been consistent, but at a slower pace than desired. Increased support for, commitment to, and feedback on efforts to implement and improve academic program assessment will support departments as they move towards a functional cycle of assessment of student learning outcomes for continuous improvement.

Although the governance model for planning and assessment has been highly effective, there is an area that may improve the process and perform a clearly defined role in assessment of improvement. In consideration of the current model, it was noted that once improvements have been made oversight is often the responsibility of administrators or faculty in different units who complete the cycle of assessment; however, there is no one group that oversees the assessment of these improvements overall. PC has played a significant role in monitoring the performance indicators for MSU's core themes, but they have not overseen performance indicators for programs or strategies that may contribute directly or indirectly to MSU's core theme goals.

The self-study has provided an opportunity and framework for a discussion of whether a formal body that can oversee the core theme outcomes and monitor improvements to feedback into the governance loop would help the institution be more forward looking. Such a group, identified for the purpose of opening dialogue as an Institutional Effectiveness Council, would share in the responsibilities for monitoring internal and external environments, as well as the assessment of improvements to, and uses of, findings from assessment practices to inform strategic position and future direction. It has been discussed that this group might also support MSU's efforts to document and assess its cycle of planning, practices, resource allocation, application of institutional capacity, and assessment of results in support of its core themes.

As demonstrated in this self-study, MSU has a dedicated leadership team, adequate resources, and adequate planning processes for continued self assessment and mission fulfillment. The institution, led by the President, the executive team, councils, committees and governance structures, considers a diverse variety of internal and external inputs when planning for the future of the university. Together the governance and educational resources at MSU support the institutional vision and direction.

CONCLUSION

Montana State University is a major research university that is nationally recognized for its excellence in student success and the dissemination of knowledge that not only benefits its students but also empowers and enriches the lives of all Montanans.

The university finds itself in a strong position as it approaches both the completion of this self-study as well as the celebration of its 125th anniversary in the coming year. MSU is rooted in its land-grant legacy and recognized for its adaptability and creativity as it meets its mission of providing nationally recognized academic programs, undergraduate research and creative projects, and outreach and engagement. MSU enrollment is at a historic high. Faculty and staff are setting new benchmarks in the creation of knowledge, earning national and international respect for the strength of the university's programs. Also, MSU's physical campus is dynamic, as is the community that surrounds and supports it.

Additionally, MSU is nearing the final year of its first comprehensive fundraising campaign, What It Takes. Launched in September 2015, the campaign's $300 million goal has been surpassed with more than $350 million contributed as of June 2017. MSU is now directing efforts to inspire giving for scholarships and faculty support with an emphasis on endowed gifts, before the campaign concludes at the end of 2018.

This self-study has allowed the university to look inward at the same time that the institution also must look outward to set goals for a future of continued growth and service. This opportunity to self-reflect, assess and realign processes, programs and goals with resources will help provide the university with the tools to drive those future successes as well as the understanding of how to sustainably adapt to what is yet to come.

There are several themes that run through the fabric of this report. The university has identified clearly articulated goals, and indicators are set forth that will help MSU track its path of progress toward those goals. There are assessment and planning cycles for learning outcomes across the warp and weft of the institution. The university must further focus on strategic goals in several areas, including graduate and diverse enrollment. Tactics have been developed to guide MSU as it carefully marshals resources that will allow it to set sights on improvements supporting and informing the next accreditation cycle.

However, the bedrock of this report, as well as the university's ongoing mission, is MSU's land-grant heritage. More than 155 years ago, the Morrill Act, passed during the Civil War, gave the opportunity for a college education to all Americans. This opportunity provided vertical social mobility and helped create the American Middle Class. It also helped lay the groundwork for this university. Thirty-one years later, Bozeman's civic leaders launched Montana's first-land grant college with the intention that the institution would culturally enrich the state and provide a vehicle for intellectual opportunities that would improve life in the community and the region. The university has done so over more than a century. It is that legacy that continues to set the university's course. Finally, it is that same vision that continues to drive Montana State University to a bright future.